InLoox PM 8

User Manual

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You can find up-to-date information at
http://www.inloox.com

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Support and contact

Contact the InLoox PM support

Thank you for choosing InLoox PM - the Project Management Software integrated in Microsoft Outlook and the Web!

Microsoft Outlook is a highly sophisticated product which is constantly under development. With ongoing Office and security updates, Exchange Server service packs and new versions of Windows, there is a wide range of supported platforms for InLoox.

As a customer of InLoox, your are entitled to benefit from InLoox' direct service and support.

NOTE Please have your customer number to hand.

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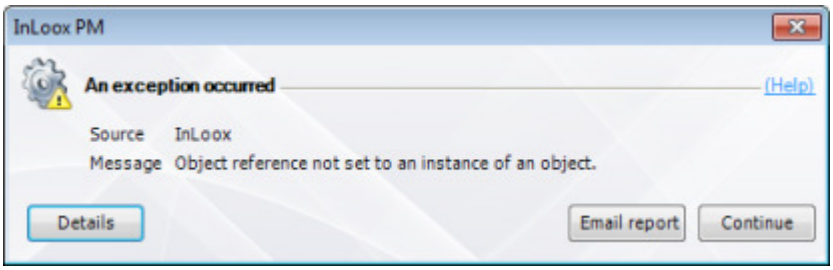
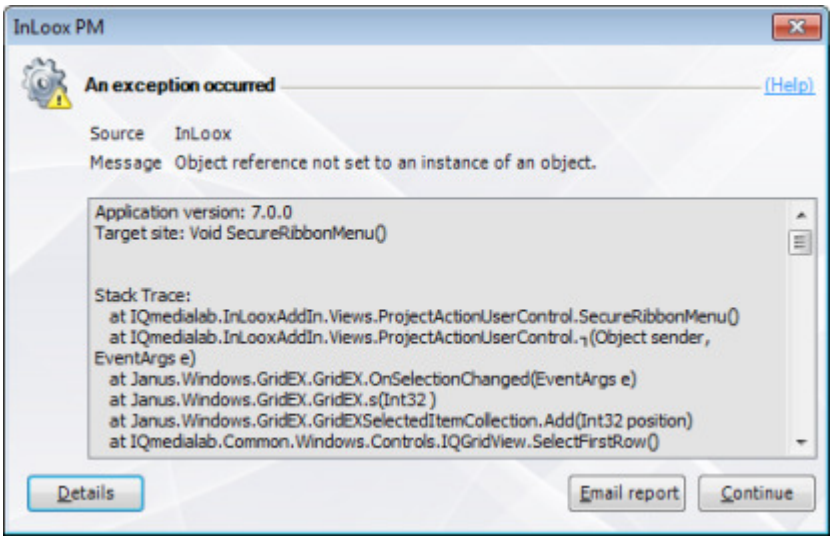
Handle exceptions

There are certain rare configurations that can cause an unpredictable behavior of the software. To cater for this we have developed a special message dialog box which permits a more accurate examination of the problem. If such an exception occurs in your installation, there are various ways to inform us about it. These options are described below.

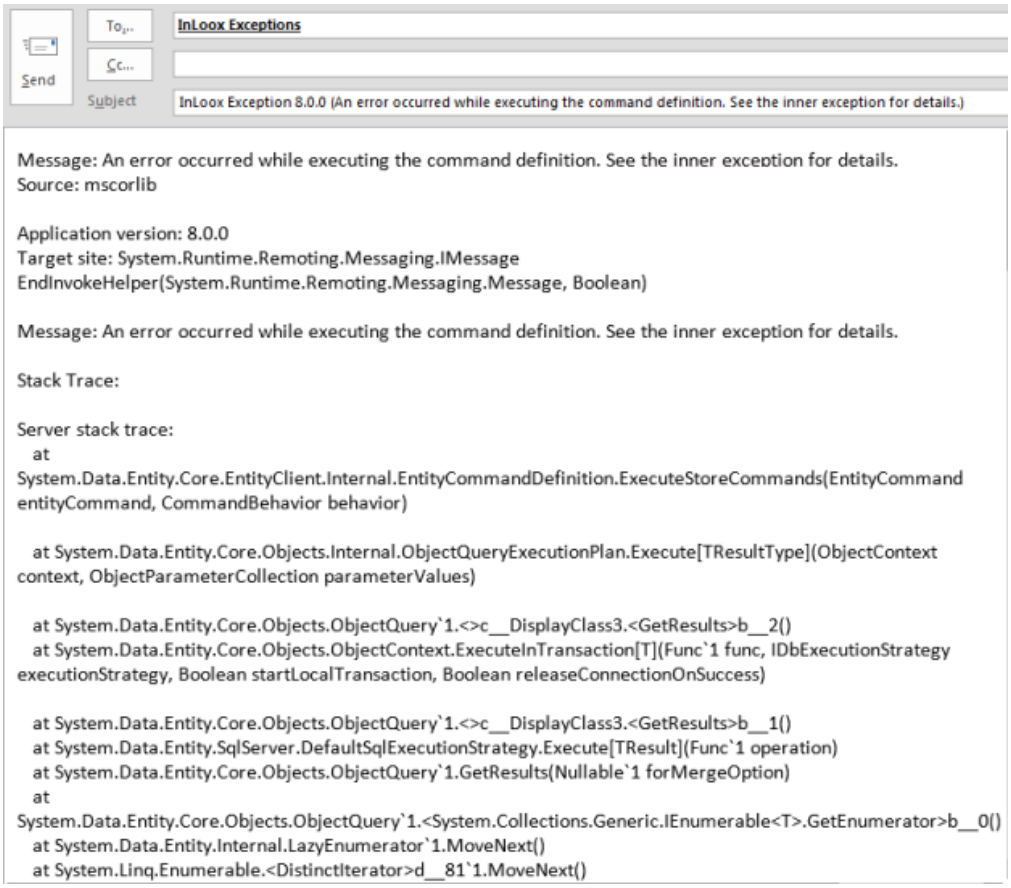
1. The InLoox PM dialog box for exception handling is displayed:



2. This dialog box allows our developers to localize an unpredicted condition more precisely and make future versions of InLoox more stable. Click **Details** in the dialog box.



3. All the exception data that the system has compiled are displayed.
4. Click the button Send report by email to send us the error via your email program. This mail does not contain any personalized information or database contents, except your sender email address. This allows our technical staff to contact you directly and to solve the exception in direct collaboration with you.
   This information is sent to our technical staff:



TIP You can, of course, also contact our support directly in the usual way. Please make sure to have the contents of the exception dialog box to hand. For more information on how to contact the InLoox support team, please see Contact the InLoox PM support.

Error messages

Below, you find a list of InLoox PM error messages and proposed solutions.
If you cannot solve the problem on your own, please do not hesitate to contact our support service, who can be reached online at http://www.inloox.com/support/

Article content

Errors in connection with the database

Errors in connection with licenses

Errors in connection with reports

Errors in connection with the database

Error message	Solution
Error: The InLoox PM database is not available. Error on establishing link with the server...	Check that the network is accessible. Check whether the offline configuration, if there is any, is correct. Contact your system administrator.
You are using InLoox PM client version X.X. The InLoox PM database version is Y.Y. Please ensure that you are using the appropriate version of the product or contact your system administrator.	The InLoox PM client version being used does not match the database version on the server. Please update the InLoox PM client.

Errors in connection with licenses

Error message	Solution
The license code input does not tally with version of InLoox PM being used.	The license code you have put in is for an earlier or later version of InLoox PM.
A licencing error has occurred. Please check the licence key or refer to your system administrator.	The license key you have put in is not valid for the installed version of InLoox PM. Please request a valid license key.
The maximum number of clients has been reached. It is not possible to use InLoox PM. Please check the licence key or refer to your system administrator.	Your InLoox PM installation is licensed for a specific number of workstations. This number has been exceeded. Please obtain a supplementary license for the required number of additional workstations.

TIP For more information on InLoox PM licensing, please see InLoox PM license terms.

Errors in connection with reports

Error message	Solution

The report template contains an error. An expression used in the template is incorrect. Please correct the report template.	Please check the report template with the help of the help documentation for the InLoox PM report designer.
The report contains no data. Empty reports cannot be created. Please edit the report template.	The report template is empty. Please update the template. For more information, please see the chapter Manage report templates and the help documentation for the InLoox PM report designer.
No printer is installed. Please install a printer to output reports.	A printer must be installed to put out a report. Please install the driver needed by your printer. For more information, please have a look at the user manual for your printer.

Rate InLoox PM

1. On the **InLoox PM** tab, in the **Extras** group, click the **Arrow** below **Help**.

   NOTE In Outlook 2007, click the **Arrow** in the **InLoox PM Toolbar**.
2. Choose **Rate InLoox PM** from the drop-down list.
3. In the opened dialog box, set up the number of stars by clicking on them.
4. In the **Comment** box write a comment, if you like to.
5. Click **OK**.

   The feedback now is sent directly to the InLoox PM product development.

Recommend InLoox PM

Would you like to recommend InLoox PM to you partners, suppliers or friends? Therefore, you can use the **Recommend InLoox** dialog box.

1. On the **InLoox PM** tab, in the **Extras** group, click the **Arrow** below **Help**.

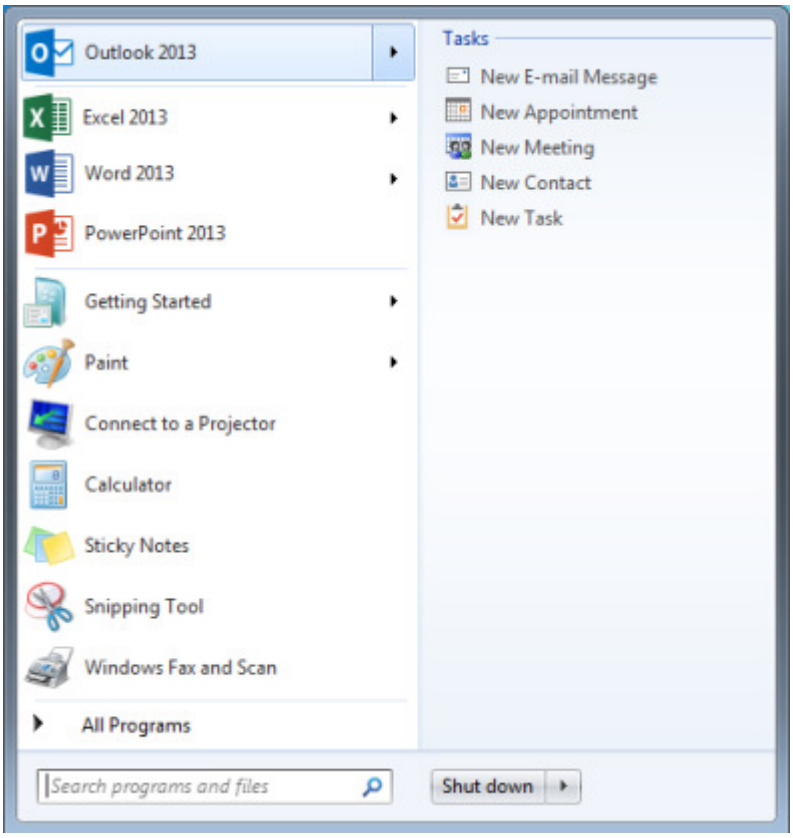
   NOTE In Outlook 2007, click the **Arrow** in the **InLoox PM Toolbar**.
2. Choose **Recommend InLoox PM** from the drop-down list.
3. On the **Recommend InLoox PM** dialog box, click **Add**.

4. On the **Choose Resource** dialog box, choose the contacts from your Outlook or InLoox PM address book you want to recommend InLoox PM to.
5. Usually, you will be offered a standardized text. You can change this text.
6. Click **OK**.
   InLoox PM will be recommended via email.

Getting started with InLoox PM

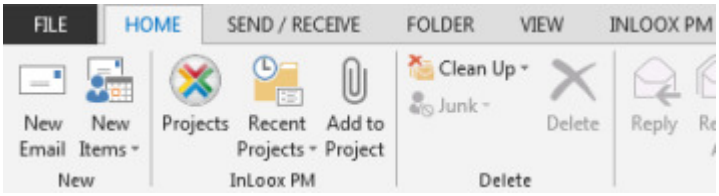
Welcome to InLoox PM! Here, you can learn how to start your first project with InLoox PM.

1. First, open Microsoft Outlook from **Start, Programs** ...



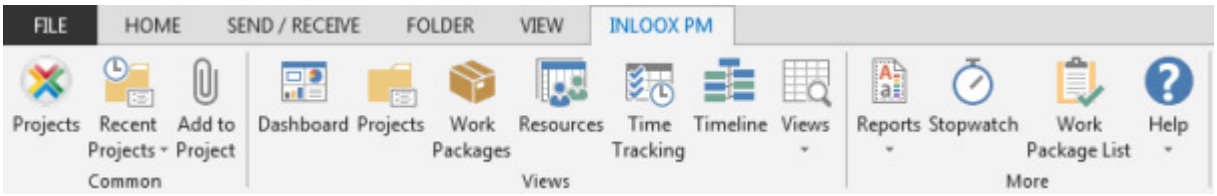
... or from your taskbar

2. InLoox PM is integrated directly into Microsoft Outlook and is always available with one click.

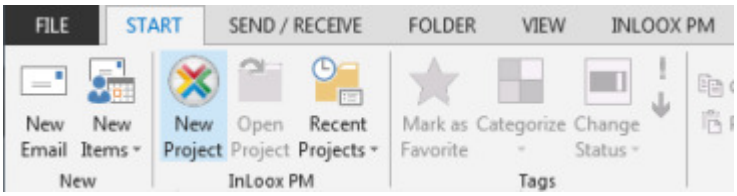


Open InLoox PM by clicking the **InLoox PM** tab in the **Outlook Ribbon**.

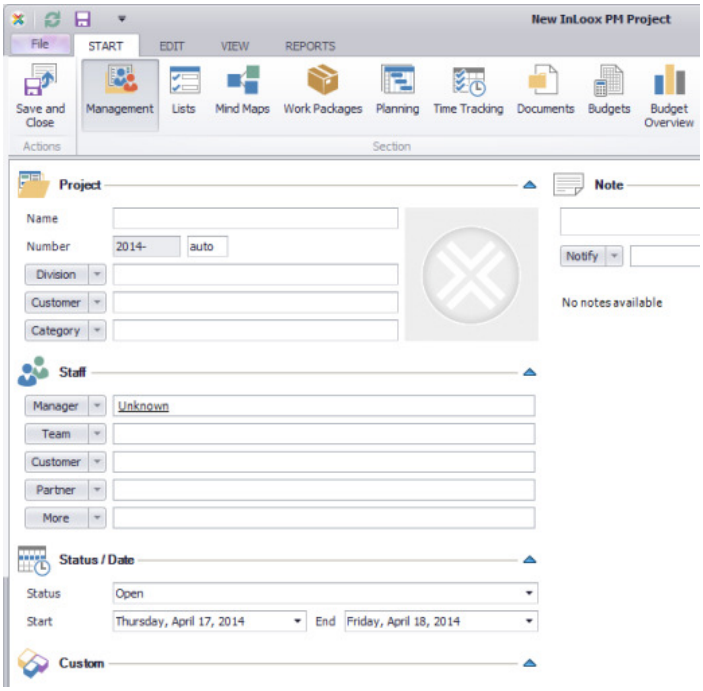
3. Then, click **Projects** in the **Common** group on the **InLoox PM** Ribbon.



4. Click **New Project** in the **New** group to enter the basic data for your first project with InLoox.



5. Complete the displayed Management form with your project data.



Ribbon/Toolbar

Work with the InLoox PM Ribbon

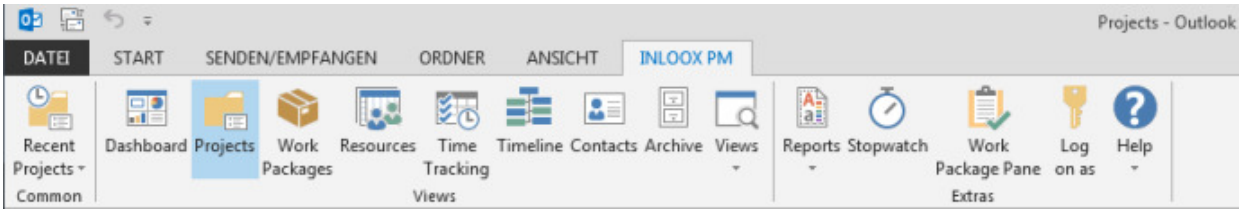
You have your Outlook offne during the work day. InLoox PM makes for your easier to access the project management add in. You can find the follwing InLOox PM features on each Outlook tab:

- **Projects** Opens a project list
- **Recent projects** displays a list of the projects you opened recently, organized by the project numbers. InLoox PM saves ten projects maximum in this view. Click one item to open a project.
- **Add to project** Add Outlook elements such as emails. tasks or calendar entries to a project.

  TIP **More information can be found under** Add Outlook elements to InLoox PM.

Do the following to open the InLoox PM Ribbon:

1. Click the **InLoox PM** tab in Outlook to display the **InLoox PM Ribbon**.The InLoox PM Ribbon is designed to help you to quickly find the commands and views you need to handle your projects. Commands are organized in a way that you can quickly switch between different views and features.



2. On the InLoox PM Ribbon you will find the following commands and views

   - **Dashboard** The Dashboard view shows selected basic data all of your projects.
   - **Projects** switches to the project list overview in the InLoox PM folder. This folder is comparable with an email, calendar, or task folder of Outlook. The InLoox PM folder can be located on the network server or on your own hard disk, depending on the installed version.
   - **Work packages** Opens a list of all work packages created in the projects. Manage them over the projects.

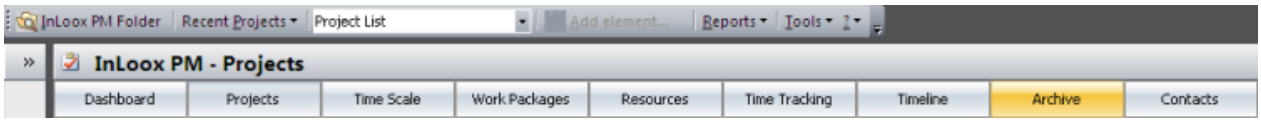
- **Resources** The visual resource overview displays the resource capability and work load. It integrates both project work packages from InLoox PM and appointments from the Microsoft Exchange free/busy service.
- **Time tracking** This view shows an overview of all project working times system-wide which you are allowed to access.
- **Timeline** Displays all changes made to the projects.
- **Contacts** InLoox PM contacts contain information such as emails addresses, postal addresses or different telephone numbers of the team members even if they are not available as an Outlook or Exchange contacts.
- **Archive** This overview shows you all archived projects.
- **Views** Here, you find a list of different views of the project list. You can also save new views or manage the existing ones. Choose whether you want to make it visible for all users or only for yourself.
- **Reports** With the push of a button, the report designer issues reports such as project summaries, budget lists, expense reports and plan/actual comparisons in a variety of file formats like Microsoft Excel, Microsoft Word, HTML, PDF and many more. You can customize your personal report by data filtering.
- **Stop watch** InLoox provides you with this feature to record simply all your working times that you spend on project workpackages. Start the stop watch when you start to work on a project-related task. When you are done, you can stop the stop watch and post the working time effort directly to the respective project.
- **Show workpackage list** displays your personal work package overview. All open workpackages are generated from the project plan.
- **Log on as** InLoox PM enables the external project partners, which don't have Windows user account in the corporate network, to logon to InLoox PM. As an InLoox PM user, you can choose between Windows and InLoox Authentication.
- **Help** Click **Help** to get help information and find useful topics on how to manage and optimize InLoox PM. The InLoox PM help provides you with further information and tips on how to edit projects. You can either browse or search for help topics and index entries by using the InLoox PM help navigation pane.

Views in the tree structure

The InLoox PM tree strcuture is displayed on the left part of the window. All the views are thus saved central and always available in each Outlook folder.

Work with the InLoox PM Toolbar

In Outlook 2007, you find the **InLoox PM Toolbar**. The InLoox PM Toolbar is always accessible and provides the following commands:



- **InLoox PM Folder** switches to the InLoox PM projectlist in the InLoox PM folder. The InLoox PM folder is comparable with an email, calendar or task folder. The InLoox PM folder can be located on the network server or on your own hard disk, depending on the installed version.
- **Recent projects** displays the list of the projects you recently opened, organized by numbers. InLoox PM saves a maximum of ten projects in this view. Click one item to open the related project.
- **Current View** provides you with a list of different views of the project list. You can also save new views or manage the existing ones. Choose whether you want to make it visible for all users or only for yourself.
- **Add to project** Add Outlook elements such as emails. tasks or calendar entries to a project.
- **Reports** The report designer issues reports such as project summaries, budget lists, expense reports and plan/actual comparisons in a variety of file formats like Microsoft Excel, Microsoft Word, HTML, PDF and many more. You can customize your personal report by data filtering.
- **Tools** provides you with the following additional features:
  - **Language** InLoox PM is multilingual. Choose between different languages in the list.
  - **Logon as** InLoox PM enables external project partners, who do not have a Windows user account in the corporate network, to logon to InLoox PM. As an InLoox PM user, you can choose between Windows and InLoox PM Authentication.
  - **Recycle projects** The recycle bin contains the overview of the deleted projects. When you delete a project from the project list, the projects are placed in the recycle bin.

  - **Backup database** With this feature, you can back up the database to protect your project information against data loss.
  - **InLoox PM Options** With the InLoox PM options, you can customize the settings and features for displaying, administrating and editing projects.

- You can find the following buttons in this list under : **InLoox PM help**, **InLoox PM online**, **Make a suggestion**, **Recommend InLoox PM**, **Rate InLoox PM**, **Report a bug** and **About InLoox PM**.

InLoox PM views

- **Dashboard** The Dashboard view shows selected basic data all of your projects.
- **Projects** switches to the project list overview in the InLoox PM folder. This folder is comparable with an email, calendar, or task folder of Outlook. The InLoox PM folder can be located on the network server or on your own hard disk, depending on the installed version.
- **Work packages** Opens a list of all work packages created in the projects. Manage them over the projects.
- **Resources** The visual resource overview displays the resource capability and work load. It integrates both project work packages from InLoox PM and appointments from the Microsoft Exchange free/busy service.
- **Time tracking** This view shows an overview of all project working times system-wide which you are allowed to access.
- **Timeline** Displays all changes made to the projects.
- **Contacts** InLoox PM contacts contain information such as emails addresses, postal addresses or different telephone numbers of the team members even if they are not available as an Outlook or Exchange contacts.
- **Archive** This overview shows you all archived projects.

Project list

Create a project

This chapter guides you through the process of project creating with certain permissions. You can create a project request for an approval, if you don't have the permission **Create projects**. Project managers and executives can easily keep track of the company's project portfolio.

The following topics are available.

Topics

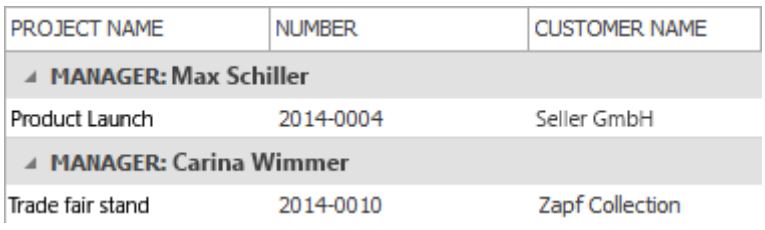
Create a new project with the permission "Create projects"

Create a project request

Create a new project with the permission "Create projects"

1. To open the project list, do one of the following:

   - Click **Projects** on the **Outlook Ribbon** to switch to the list of all available projects in InLoox PM.
   - Click **Projects** at the bottom of the screen and then click **Projects** in the tree structure on the left.



PROJECT NAME	NUMBER	CUSTOMER NAME
MANAGER: Max Schiller		
Product Launch	2014-0004	Seller GmbH
MANAGER: Carina Wimmer		
Trade fair stand	2014-0010	Zapf Collection

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Do one of the following to add a new project:

   - In the **InLoox PM** group, click **New Project**.

- Double-click on an empty field in the project list.
- Keyboard shortcut Press **F2** in the project list to create a new project in InLoox PM.

3. Enter a **project name** and further information on the project.
4. As a creator, you will automatically be added as project manager.

TIP The customer list contains the preselection of all companies that participate in an InLoox PM project. For more information see Assign a division, customer and category.

5. In the project, on the **Start** tab, click **Save and Close** after you entered all required information.

TIP Choose this way of ctreating only, if you have the **Create projects** permission. To learn more, see Set up permissions and List of permissions.

Create a project request

1. To open the project list, do one of the following:

   - Click **Projects** on the **Outlook Ribbon** to switch to the list of all available projects in InLoox PM.
   - Click **Projects** at the bottom of the screen and then click **Projects** in the tree structure on the left.

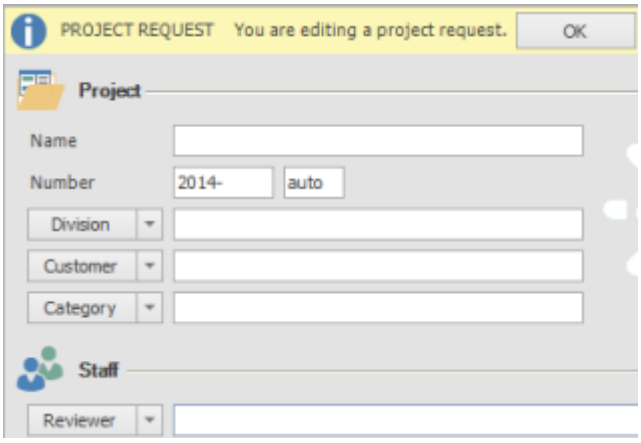
PROJECT NAME	NUMBER	CUSTOMER NAME
MANAGER: Max Schiller		
Product Launch	2014-0004	Seller GmbH
MANAGER: Carina Wimmer		
Trade fair stand	2014-0010	Zapf Collection

   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Do one of the following to add a new project:

   - In the **InLoox PM** group, click **New Project**.
   - Double-click on an empty field in the project list.
   - Keyboard shortcut Press **F2** in the project list to create a new project in InLoox PM.

3. On the **Management** page, in the **Project Request** area click **OK** to edit it.



4. On the **Staff** area, click **Reviewer**.
5. Select a reviewer for the approval from the drop-down list.
   In this list you can see only the contacts with the **Release project request** permission.
6. Click **Save and Close**, in the **Start** tab.
   Now the selected reviewer will be notified about this request.
   The project request is now displayed in the tree structure of the InLoox PM project list.

NOTE For this method you need two permissions: **Create** and **Release project request**.

General features and printing of the project list

The InLoox PM project list provides you with various features that make project editing easier and faster. As a standard, you can see only those projects in the project list that are accessible for you.

Article content

Important features of the InLoox PM Ribbon

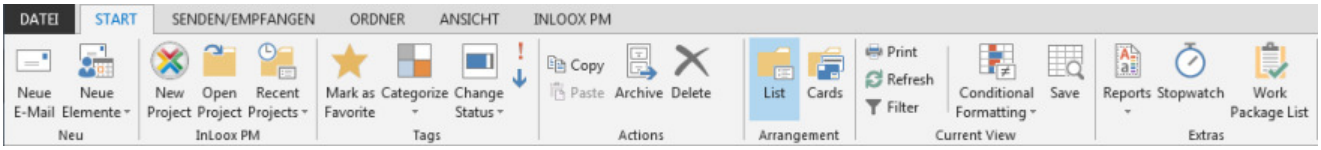
Project list features

Print in the project list

Important features of the InLoox PM Ribbon

Click **Projects**

on the Outlook Ribbon to switch to the InLoox PM project list. You will find the following features on the tab **Start**, in the **InLoox PM Ribbon**:



- **Create a new project** Click **New Project** in the **New** group to start a new project in InLoox PM.
- **Open a project** Click **Open project** in the **InLoox PM** group.
- **Access quickly the last project** Click **Recent Projects** in the **InLoox PM** group. Select from the dropdown list the project you wanted.
- **Create the list of prioritized projects** Select a project from the project list and click **Mark as favorite** in the **Tags** group. All marked projects are displayed then in the tree structure on the left side of the window. Click **Favorites** under **Projects**.
- NOTE The created favorite view is only visible for you.
- **Categorize a project** In order to assign a category to one project (e.g. **circular project** or **new business**), click **Categorize** in the **Tags** group and choose one category in the context menu.

  TIPS

  - To find out more about project categories see Assign a division, customer and category.
  - You can also create your own category for your projects. For further instructions on how to create your own categories, see Manage categories.
- **Change status** You can also change the status or the degree of completion of the selected project in the project list. Click **Change Status** and choose from the list the respective status, e.g. **started** or **completed**.
- **Set a priority** You can set the level of importance of a project. In the Tags group select a **Low** or **High** priority.
- **Copy and paste a project** These buttons can be found in the **Actions** group . The **Copy** and **Paste** features help to create projects quickly. You can modify them afterwards.
- **Archive a project** Move a marked project via **Archive** to the InLoox PM archive view. All archived projects are displayed then in the tree structure on the left side of the window. Click **Archive** under **Projects**.
- **Delete project** Remove the selected project with a click of the **Delete** button.
- **Change the view of the project list** Select between **List** and **Cards** view in the **Arrangement** group.
  Double-click to open a project.

- **Print the project list** Click Print in the **Current View** group.
- **Refresh** Via the **Refresh** button in the **Current View** group, all changes will be updated and the view will be reloaded.
- **Filter the important project information** Click **Filter** in the **Current View** group.
- **Define an early warning system** Click **Conditional Formatting** in the **Current View** group. Now you can highlight columns according to personalized rules.
- **Create a new project list view** Click **Save** in the **Current View** group, after you have adjusted the project list.
- **Reports** You can **Create Reports** or view the **Saved Reports** in the project list by clicking **Reports**.
- **Work Package Pane** Provides you an overiew of the work packages on the side panel no matter wich Outlook folder you now use.

Project list features

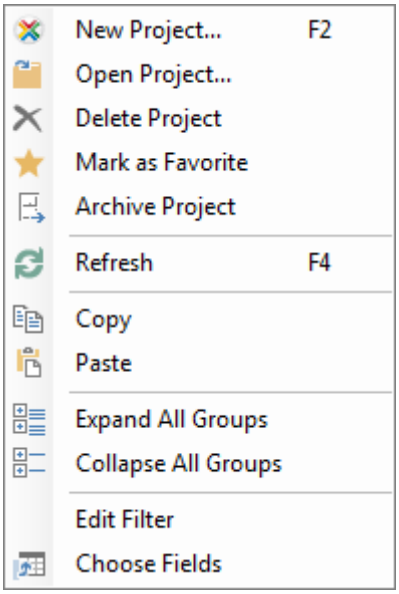
The following features can be found in the project list:

- **Open a project** Double-click on one item in the project list or right-click on the item to open the context menu and choose **Open Project...** from the list.
- **Create a new project** Double-click on an empty space in the project list or right-click there to open the context menu and choose **New Project...** from the list.

  TIP For more information see Create a project.
- **Find quickly projects with the same initial letters** Press the respective letter on your keyboard and switch to another project with the same initial letters in the name.

Features in the context menu

- The context menu provides you with almost all basic features that are also available on the InLoox Ribbon, such as **New Project...**, **Open Project...**, **Delete Project**,**Archive Project**, **Refresh**, **Copy** and **Paste.** It has also such features as **Expand** and **Collapse All Groups**, **Show Filter**. Right-click on one of the projects in the project list to open the context menu.



- **Choose Fields** This feature sorts and organizes the project by the required data.
    - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column headers.
    - Reset the fields via Drag&Drop back into the dialog box.

Keyboard shortcut

- **F2** Create a new project.
- **F4** Refresh the project list.
- **CTRG+P** Print the project list.
- **CTRG+C** Copy a project into the clipboard.
- **CTRG+V** Paste a project from the clipboard to the project list.

General features and printing of the project list in InLoox PM for Outlook 2007

The InLoox PM project list provides you with various features that make project editing easier and faster. As a standard, you can see only those projects in the project list, to which you have an access.

Article content

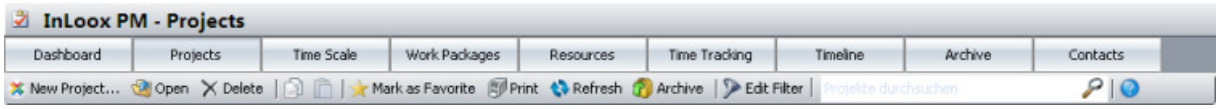
Important features of the menu bar

Project list features

Print in the project list

Important features of the menu bar

Click **InLoox PM Folder** in the **InLoox PM Toolbar** to switch to the InLoox PM project list. You will find the following features in the menu bar:



- Create a new project Click New Project in the menu bar.
- Open a project Click this button to see all related project information.
- Delete project Remove a selected project with by clicking the Delete button.
- Copy and paste You can copy and paste one project or several projects at the same time.
- Create the list of prioritized projects Select a project from the project list and click Mark as favorite in the Tags group. All marked projects are displayed then in the tree structure on the left side of the window. Click Favorites under Projects.

  NOTE The created favorite view is only visible for you.
- Print the project list Click Print in the Current View group.
- Refresh Via the Refresh button, all changes will be updated and the view will be reloaded.
- Archive a project Move a marked project via Archive to the InLoox PM archive.
  All archived projects are displayed then in the tree structure on the left side of the window.
  Click Archive under Projects.
- Filter Show or hide the filter using this button.

Project list features

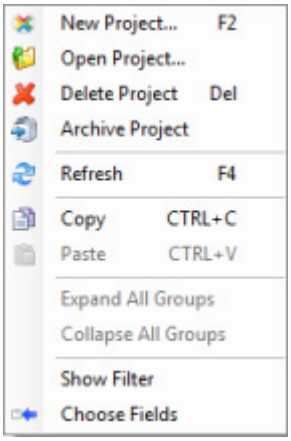
The following features can be found in the project list:

- **Open a project** Double-click on one item in the project list or right-click on the item to open the context menu and choose **Open Project...** from the list.
- **Create a new project** Double-click on an empty space in the project list or right-click there to open the context menu and choose **New Project...** from the list.

  TIP For more information see Create a project.
- **Find a project with the same initial letters quickly** Press the respective letter on your keyboard and switch to another project with the same initial letter.

Features in the context menu

- The context menu provides you with almost all basic features that are also available in the InLoox PM Toolbar, such as **New Project...**, **Open Project...**, **Delete Project**, **Archive Project**, **Refresh**, **Copy**, **Paste**, **Expand** and **Collapse All Groups** or **Show Filter**. Right-click on one of the projects in the project list to open the context menu.



- **Choose Fields** This feature sorts and organizes the project list by the required data.
  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the header columns.
  - Reset the fields per Drag&Drop back into the dialog box.

Information rules in the project list

The completed or cancelled projects are struck through and marked grey in the project list.

Keyboard shortcut

- **F4** Create a new project.

- F2 Refresh the project list.
- CTRG+P Print the project list.
- CTRG+C Copy a project into the clipboard.
- CTRG+V Paste a project from the clipboard to the project list.

Conditional formatting

By applying the conditional formatting to your project list, you can quickly highlight the project information that meets certain conditions. This feature can be used as a warning system for the project control and displays a critical data.

1. In the project list, on the **Start** tab, in the **Current View** group, click **Conditional Formatting**.
2. In the drop-down menu select one:
    - Add Preconfigured Formatting (will be displayed later, after one have been saved)
    - Add Simple Formatting
    - Add Extended Formatting

The following part describes each of these formatting type by using the examples.

Simple Formatting

The simple formatting compares different columns and values. This command defines the formatting (such as colors, fonts, images. etc.) using arguments (equal, not equal, greater than, between, etc.)

In this example the projects will be displayed in red, if their actual expenses are greater than a specified value.

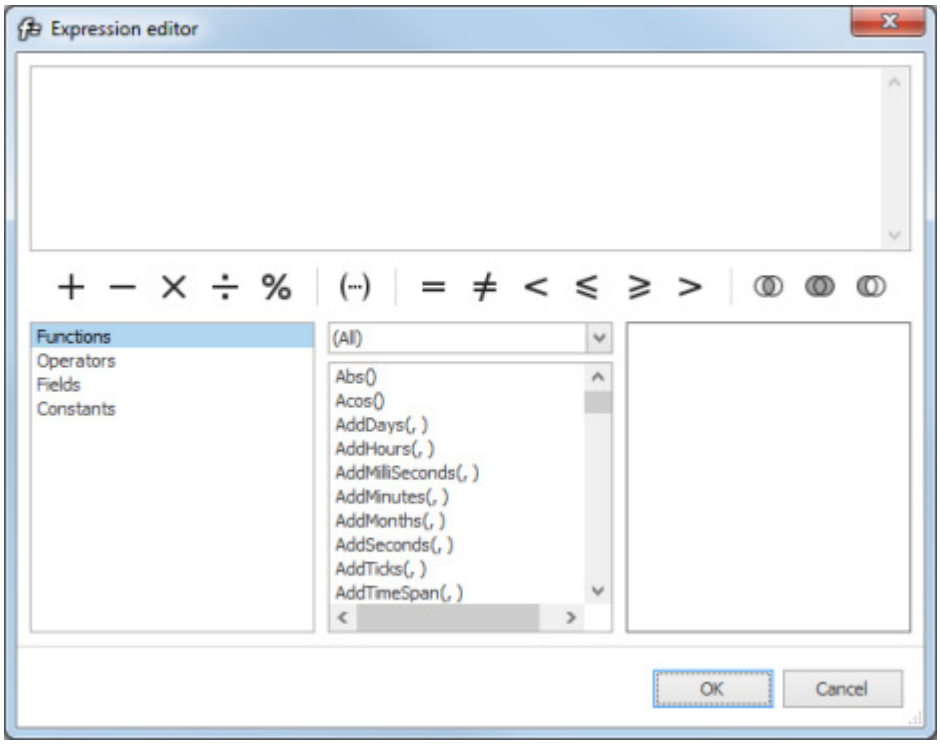
1. On the side panel, in the **Condition** area, in the **Column** field select **Total Expenses (Actual)**.
2. In the **Condition** field choose an argument **Greater than**.
3. In the **Value 1** field enter a value for comparison, e.g. 5000.
4. In the **Format** area define the formatting, e.g. **BackColor** red.

All projects with the actual expenses are marked in red, if they meet this rule, i.e. their content is greater than a specified limit value.

Extended Formatting

The extended formatting allows to compare different fields from the project list by using different formula. This example shows you how to use a formula to format a cell. Two fields actual and planned expenses will be compared.

1. On the side panel, in the **Condition** area, in the **Expression** field, click **Select a formula** ... . It invokes the **Expression Editor** dialog box, which allows you to specify an expression that will be used to obtain calcualted field values. Here you can construct the required expression.



2. On the **Expression** editor dialog box, in the lower left, click **Fields**.
3. Right from it select **Total Expenses (Actual)** from the list by double-clicking it.
4. Select one relational operator, e.g. greater than **>**.
5. Now select **Total Expenses (Plan)** from the list by double-clicking it.
6. Click **Ok**.
7. In the **Format** area select **BackColor**, e.g. green.

The defined formatting will be applyed on those projects, where the actual expenses a greater than the planned one.

NOTE Activate the check box **Apply for cell** in order to format the whole cell of the project in the project list.

Preconfigured Formatting

The most preconfigured formatting in the drop-down menu are set by default. All conditional formatting you have created are saved automatically as templates under preconfigured formatting.

If you want to remove a template, click it and then click **Delete Formatting** below on the side panel.

Search and find projects

You will find in the project list several options to find a project you are looking for. This chapter will introduce you to the **search function**, the use of **views** and **filters** when searching a project.

Article content

Search function

Use views

Use filters

Search function

1. Click **Project list** on the **Outlook Ribbon** to switch to the InLoox PM project list.

   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.
2. Click the field **Search projects** above the project list
3. Type the project name or other information on the project you want to find.
4. Click the **Search** symbol .
5. The projects, which include the entered text, are displayed. All search results are also displayed on the side panel of each opened project.

   NOTE If the search is completed, you can clean up the search field by clicking **Close search** .

Use views

1. Click **Project list** on the **Outlook Ribbon** to switch to the InLoox PM project list.

   NOTE In Outlook 2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. On the **Start** tab, in the **Actual Views** group, click **Save** to save the adjusted view of the project list.

   TIP For more information on how to save a view, see Generate personalized views.

3. The saved view will be displayed under Projects in the tree structure on the left part of the window. Choose one view, e.g. **Projects: project manager view**. You will see an overview of all projects to which you are assigned as a project manager.

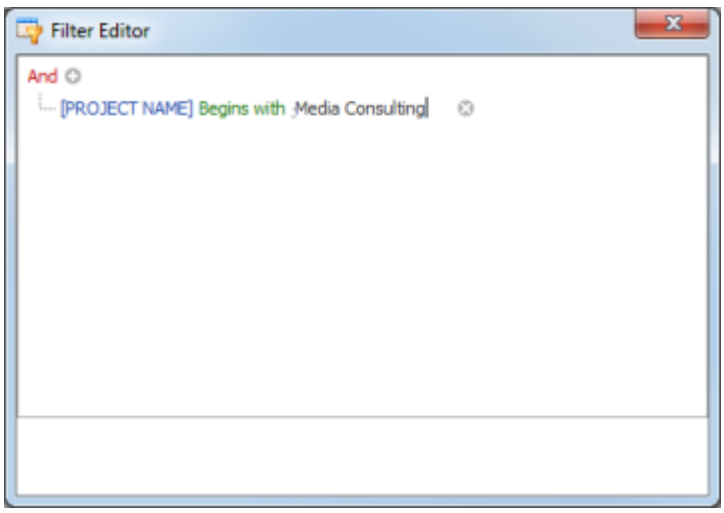
Use filters

1. Click **Project list** on the **Outlook Ribbon** to switch to the InLoox PM project list.

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.

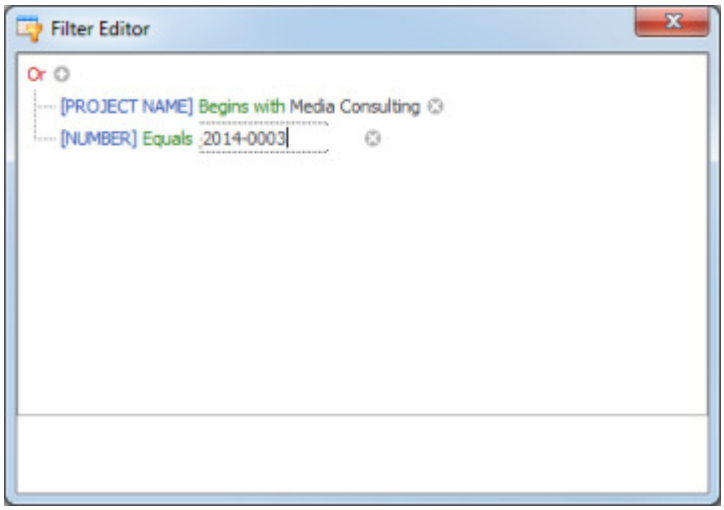
2. On the **Start** tab, in the **Actual Views** group, click **Filter**.
3. This invokes the **Filter Editor** dialof box, which allows you to build filter criteria.
4. To learn how to work with Filter Editor, see the following examples.

    1. This example shows you how to create a simple filter criteria.
       When invoking the Filter Editor for a grid control, if no filtering has yet been applied, the Filter Editor will contain a new filter condition referring to the project view or side, where it was opened. The Filter Editor displays now the comparison operator (AND), the condition's link (PROJECT NAME) together with the logical operator (*Begins with)*.



    2. Enter a text in the field behind the logical operator, e.g. Media Consulting.
    3. Click **OK**.
       InLoox PM filters the projects by the selected criteria, e.g. **Project name begins with**.

5. You can also group the filter criteria, e.g. by the comparison operator (OR). Learn how to do this:

    4. Click the logical operator (*Begins with)* and select OR from the list.
    5. Click the symbol **Add** to add another criteria.
    6. Click the condition's link (PROJECT NAME) and select the field NUMBER from the list.
    7. Click the logical operator (*Begins with)* and select *Equal*s.
    8. 

    9. Now, click the value box and enter a number, e.g. 2014-0003.
       InLoox PM filters the projects by the two selected criteria, e.g. **Project name begins with** OR Number equals.

NOTES

- Use the symbols **Add** or **Remove** to create and customize filter criteria.
- All filter results are also displayed on the side panel of each opened project.

Copy and delete projects

You can copy or delete the projects in the project list. The description below explains how to do it.

Article content

Copy a project

Delete a project

Copy a project

1. Click **Projects** in the **Outlook Ribbon** to switch to the InLoox PM project list.
2. Choose the project from the project list, that you want to copy.
3. Use one of the following actions to copy the project:

    - Copy with the keyboard shortcut **STRG+C.**
    - Copy with the **context menu** by right-clicking on the project. Choose **Copy** from the list.
    - Copy via the **Copy** button, in the group **Actions**, on the **Home** tab, in the **InLoox PM Ribbon**.

4. Paste the marked project by using one of the following actions:

    - Via the keyboard shortcut **STRG+V**, via the context menu or via the **Paste** button, in the group **Actions**, on the **Home** tab, in the **InLoox PM Ribbon**.

NOTE Please choose another project number for the copied project in order to edit it. See Set a project name and a number for more information.

Delete a project

1. Click **Project list** in the **InLoox PM Ribbon** to switch to the InLoox PM project list.
2. Choose the project from the project list, that you want to delete.
3. In the **InLoox Ribbon**, on the **Home** tab, in the **Delete** group, click **Delete** or right-click on the project and choose **Delete Project** from the context menu.

Copy and delete projects in Outlook 2007

You can copy or delete selected projects in the project list. The description below explains how to do it.

Article content

Copy a project

Delete a project

Copy a project

1. Click InLoox Folder in the InLoox Toolbar to switch to the InLoox project list.
2. Choose the project from the project list, that you want to copy.
3. Use one of the following actions to :
   - Copy with the keyboard shortcut **STRG+C.**
   - Copy with the **context menu** by right-clicking on the project. Choose **Copy** from the list.
   - Copy via **Copy** button in the menu bar.
4. Paste the marked project by using one of the following actions:
   - Via the keyboard shortcut **STRG+V**, via the context menu or via the **Paste** button in the menu bar.

NOTE Please choose another project number for the copied project in order to edit it. See Set a project name and a number for more information.

Delete a project

1. Click Inloox Folder in the InLoox Toolbar to switch to the InLoox project list.
2. Choose the project from the project list, that you want to delete.
3. Click Delete in the menu bar or right-click on the project and choose Delete Project from the context menu.

Management

Assign a project name and number

1. Create a new project.

   TIP For more information on how to create a project see Create a project.

2. In the **Project** area, in the **Name** field enter the name of your project. The project name is a freely definable description of the project.

   NOTE The project name can be used for more than one project.

3. In the **Name** field enter the number of your project to identify it in the InLoox PM system. This field is a mandatory field. You can customize the number in the InLoox PM options.

   TIP For more information see Change the number format.

Adjust the project number

In the InLoox PM options, you can customize and configure the InLoox PM features, inter alia the project number.

Article content

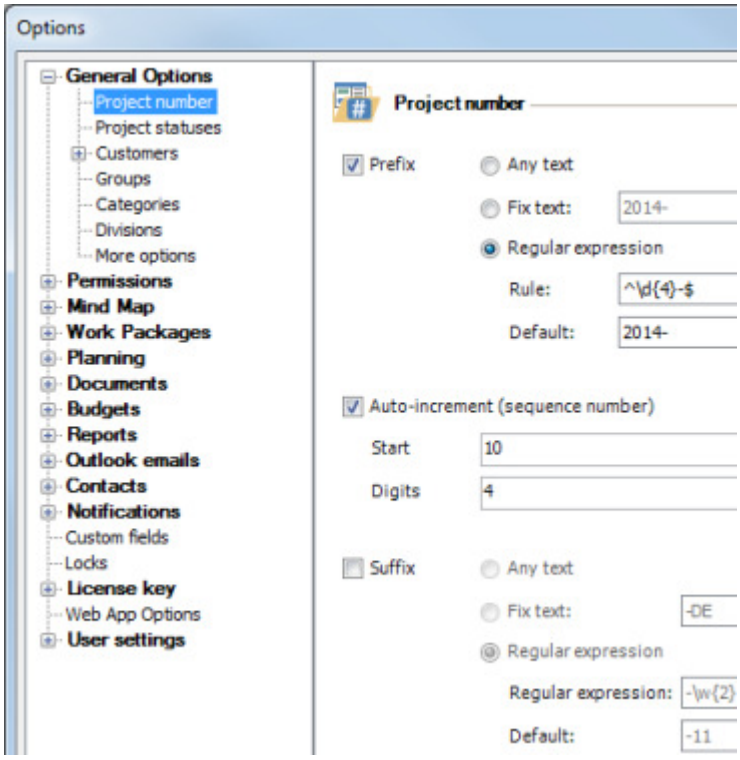
Setting a project number

Mode description for prefix and suffix

Examples of common formats

Setting a project number

1. Open the dialog box **InLoox PM Options**.
2. Under **General options**, click **Project number**. On the right side you see the **Project number** area:



3. Choose the respective option by activating the related check box:

   - For the project number choose **Prefix** (leading character string), **Sequence number** or **Suffix** (trailing character string).
   - For the number setting, you need at least a **Prefix** or a **Sequence number**.
   - Combine a **Prefix** or **Suffix** with a **Sequence number**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Mode description for prefix and suffix

Mode	Data type and significance
Any text	Any character string of any length, which can be changed.
Fix text	Any character string of any length, which cannot be changed, e.g. the word project.

Mode	Data type and significance
Regular expression	Input a format and an example. InLoox PM verifies if the number of the created project has the right format. If the number doesn't correspond to the specified format, the user is asked to correct the project number.

Examples of common formats

Example	Configuration
Four-digit year combined with sequence number (e.g. "Project 2011-008") components: "Project 2011-" (fixed prefix with year). "Sequence number" (maximum 3 digits with leading zeroes).	Prefix: Rule: ^Customer \d{4}-$ Standard value: Customer 2011- or Customer 2012- Sequence number: Number of digits: 3 Suffix: none
Sequence number with country code components: "Sequence number" (maximum 5 digits with leading zeroes). Country code (-DE, -AT, -FR, ...).	Prefix: none Sequence number: Number of digits: 5 Suffix: Rule: ^-\w{2}$ Standard value: -DE
Simple sequence number	Prefix: none

Example	Configuration
"Sequence number" (maximum 6 digits with leading zeroes).	Sequence number: Number of digits : 6 Suffix: none
Free format	Prefix: any text Sequence number: none Suffix: none

WARNING Effects of changing the number format:

- New projects are created automatically with project numbers in the new format.
- Existing projects retain their old numbers.
- Once assigned sequence numbers cannot be used again.

Change the number format

In the InLoox PM options, in the area **Project number**, you can define the format rules for project numbers. Please note the possible effects when changing settings. For more information see Adjust the project number.

Article content

Format rules

Sample formats

Format rules

Character	Data type and significance
.	Any single character.
\d{COUNT}	Any numeric (0-9) with COUNT digits. COUNT stands for any positive integer, e.g. 5.
\w{COUNT}	Any character string (A-Z, a-z, 0-9, underscore "_") with COUNT characters. COUNT stands for any positive integer, e.g. 5.
\D{COUNT}	Any character string (A-Z, a-z, special characters, umlauts, spaces) with COUNT characters. Numerics are not allowed.
\W	Single special character. (A-Z, a-z) or numeric (0-9) are not allowed.
STRING	STRING stands for a fixed character string specified by the user, e.g. project, department_A, PID.
^STRING$	Expressions placed between ^ and $ must not be empty and must be of the defined length. The only permissible input in this example is STRING. Without ^ and $, STRING1234 or an empty text is also a valid input.

Sample formats

Format	Examples
.._\d{4}	right: Ab_1234, ?!_0000 wrong: 12-1234, ab-abcd
SAMPLE...	right: SAMPLE1234, SAMPLEABCD, SAMPLEab12, SAMPLE

Format	Examples
	wrong: SAPMLE1234, 1234SAMPLE
\w{2}-\d{2}	right: ab-12, AB-12, 01-12, a1-99
	wrong: 12-ab, öö-12, ??-12
\W{2}SEPERATOR\D{2}	right: !!SEPERATOR12, 12SEPERATOR12, abSEPERATOR!?
	wrong: !!TRENNab, 12SEPERATORab, abSEPERATOR12

Assign a division, customer and category

On the site **Management**, in the area **Project** you can assign a **division**, **customer** and **category**. These entries help you to easily find, filter, sort and group the projects in the project list.

Article content

Add a division

Determine a customer

Choose a category

Add a division

1. Open an existing project or create a new one.

   TIP For more information on how to create a project see Create a project.
2. On the **Management** page, in the **Project** area, click **Division**.
3. In the **Division Structure** dialog box choose an internal or external division for the responsibility of the project.

TIP For more information on how to create, edit or delete a division in InLoox PM see Adjust the division structure.

4. Click **OK**.

NOTE If you have already saved new divisions in the InLoox PM options, you can see them in the quick selection of the **Division** command. Click the **Arrow** and choose a division from the drop-down list. Click **Delete selection**, if you want to clear the selection.

Determine a customer

1. Open an existing project or create a new one.
   On the **Management** page, in the **Project** area click **Customer**, to open the dialog box.
2. Do one of the following in the **Customer** dialog box:
   - Add one of the customers from the list that is already set.
   - Click **New** to add another customer. In the **New Customer** dialog box type a new name in the **Name** box and click **OK**.
3. Click **OK**.

NOTE If you have already saved new customers in the InLoox PM options, you can see them in the quick selection of the **Customer** command. Click the **Arrow** and choose a customer from the drop-down list. Click **Delete selection**, if you want to clear the selection.

Choose a category

1. Open an existing project or create a new one.
   TIP For more information on how to create a project see Create a project.
2. On the **Management** page, in the **Project** area click **Category**. The **Category** dialog box will be displayed.
3. Choose one or more categories from the list in this dialog box.
   The categories are free-definable classification criterion for the projects.
   TIP For more information on how to create, edit or delete a category in the InLoox PM system see Manage categories.
4. Click **OK**.

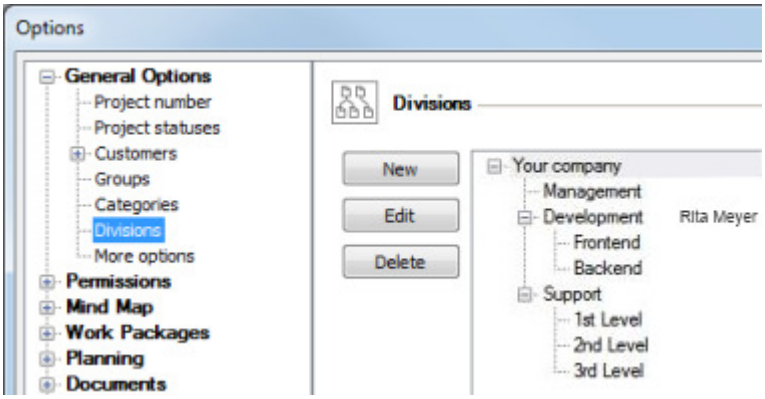
NOTE Use the quick selection by clicking Arrow . In the drop-down list choose a category you want to add. Click Delete all categories to clear the selection.

Adjust the division structure

InLoox PM uses its own division structure which is independent of the Outlook one. This structure is available only in the **InLoox PM Enterprise Edition** and is selectable in the projects.

The divisions can be structured to any level and can be assigned to a specific project. you can also add the resources to the divisions.

1. Open the dialog box InLoox PM Options.
2. Under **General options** click **Divisions**. On the right side you see the **Division** area:



3. Do one of the following:

   - Insert a new division to change the division structure.

     1. Click **New** and enter a name in the **Name** box and notes in the **Description** box (if necessary) in the dialog box **New Division**.
     2. In the **Resources** area, click **Add**.
     3. In the **Address Book** dialog box, select a contact and click **OK**.
     4. Click **OK**.

        Now the new division with the resource in the division structure is displayed.

   - Edit the existing division structure. Choose one entry from the division list and click **Edit** in order to change it.

   - Remove a selected division from the list by clicking **Delete**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of editing or deleting a division:

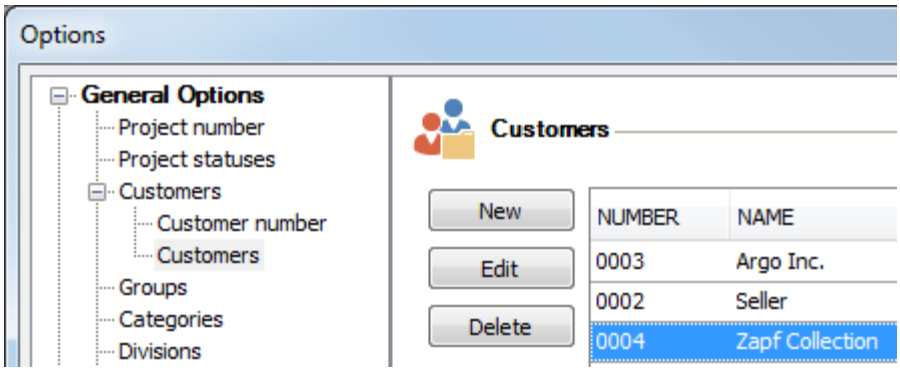
- The renaming of a division takes immediate effect in all relevant projects.
- The deletion of a division takes immediate effect in all relevant projects.
- The new division is visible on the Management and Work Packages page by adding a resource.

Create and manage a customer

The InLoox PM options support you with a central customer management. Create a new customer system-wide in the InLoox PM options as well as in the project directly.

To manage customers, do the following:

1. Open the dialog box **InLoox PM Options**.
2. Under **General options** click **Customer** and then **Customers**. On the right side you see the **Customers** area:



3. Do one of the following:
   - Insert a new customer in InLoox PM by clicking **New**. In the **New customer** dialog box enter a name in the **Name** field. InLoox PM automatically assigns a number to the new customer.
   - Change the name of an existing customer. Choose the respective customer from the list and click **Edit**.
   - Remove a customer from InLoox PM by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in IInLoox PM.

WARNING Effects of editing or deleting a customer:

- The renaming of a customer takes immediate effect in all relevant projects.
- The deletion of a customer takes immediate effect in all relevant projects.

Adjust the customer number

In the InLoox PM options, you can customize and configure the InLoox PM features, inter alia the customer number. In the InLoox PM Options, in the Customer number area, you can define the number format rules.

Article content

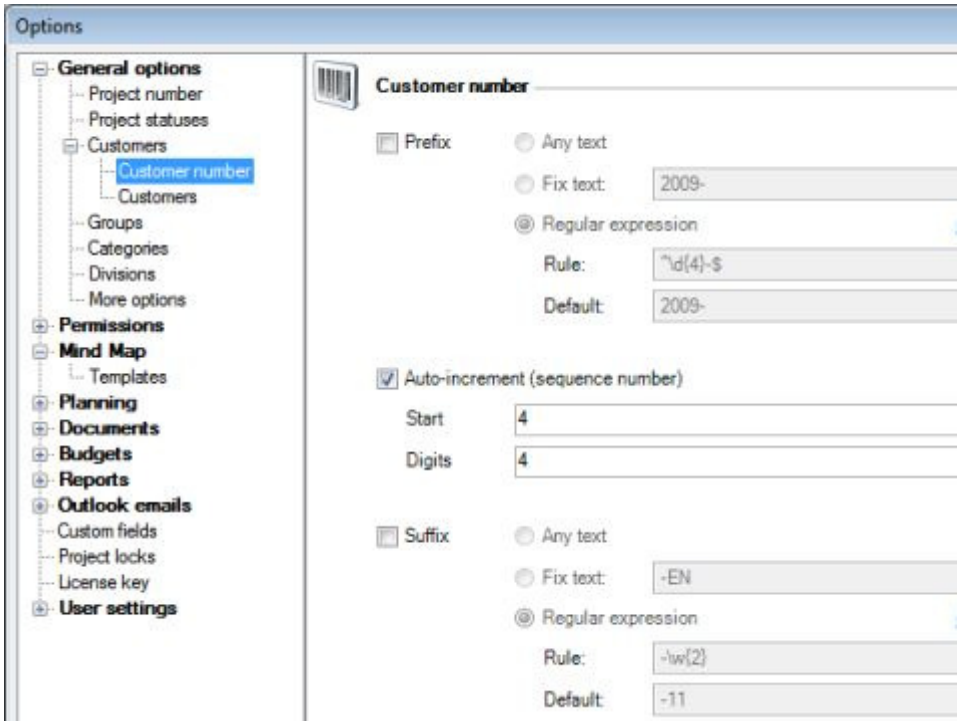
Adjust a customer number

Mode description for prefix and suffix

Examples of common formats

Adjust a customer number

1. Open the dialog box **InLoox PM options**.
2. Under **General options** click **Customer number**. On the right side you see the **Customer number** area:



3. Choose the required options by activating the related check boxes:

   - For the project number, choose **Prefix** (leading character string), **Sequence number** or **Suffix** (trailing character string).
   - For the number setting you need at least a **Prefix** or **Sequence number**.
   - Combine a **Prefix** or a **Suffix** with a **Sequence number**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Mode description for prefix and suffix

Mode	Data type and significance
Any text	Any character string of any length, which can be changed.
Fix text	Any character string of any length, which cannot be changed, e.g. the word project.
Regular expression	Input a format and an example. Please note the format rules.

Mode	Data type and significance
	InLoox PM verifies if the number of the created project has the right format. If the number doesn't correspond to the specified format, the user is asked to correct the project number.

Examples of common formats

Example	Configuration
Four-digit year combined with sequence number (e.g. "Project 2011-008") components: "Project 2011-" (fixed prefix with year). "Sequence number" (maximum 3 digits with leading zeroes).	Prefix: Rule: ^Customer \d{4}-$ Standard value: Customer 2011- or Customer 2012- Sequence number: Number of digits: 3 Suffix: none
Sequence number with country code components: "Sequence number" (maximum 5 digits with leading zeroes). Country code (-DE, -AT, -FR, ...).	Prefix: none Sequence number: Number of digits: 5 Suffix: Rule: ^-\w{2}$ Standard value: -DE
Simple sequence number	Prefix: none

Example	Configuration
"Sequence number" (maximum 6 digits with leading zeroes).	Sequence number: Number of digits : 6 Suffix: none
Free format	Prefix: any text Sequence number: none Suffix: none

WARNING Effects of changing the number format:

- New projects are created automatically with numbers in the new format.
- Existing projects retain their old numbers.
- A once assigned sequence number cannot be used again.

Manage categories

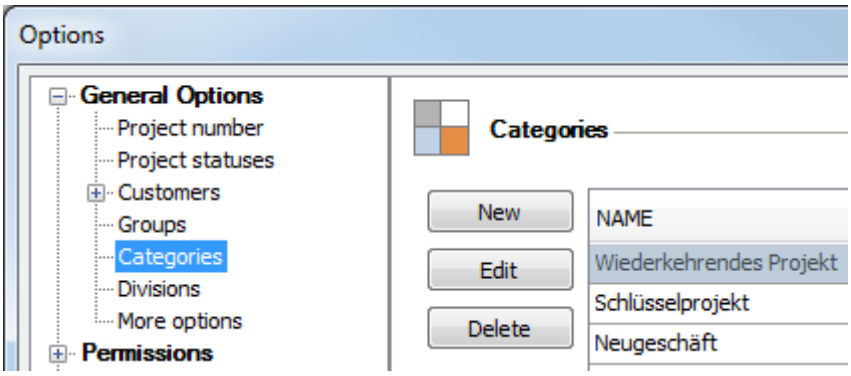
InLoox PM uses its own category list for the projects, which is independent from the Outlook one. The list has key advantages in the multiuser versions **InLoox PM Workgroup** or **Enterprise Server** in comparison to the standard Outlook category list:

- The category list is consistent across all workstations. This saves manual reconciliation effort between the individual workstations.
- The list can only be maintained by the InLoox PM administrator, which ensures that only standard categories are available.

To manage a category, do the following:

1. Open the **InLoox PM options**.

2. Under **General options** click **Categories** . On the right side, you see the **Categories** area:



3. Do one of the following:

   - Insert a new category in InLoox PM by clicking **New**. In the **New Category** dialog box, in the **Name** field enter a new name.
   - Change the name of an existing category. Choose one category from the list and click **Edit**.
   - Remove a category from InLoox PM by clicking **Delete**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of editing or deleting a category:

- The renaming of a category takes immediate effect in all related projects.
- The deletion of a category takes immediate effect in all related projects.

Add a picture to a project

1. Open an existing project or create a new one.
2. On the **Management** page, in the **Project** area, click picture symbol or click the **Edit** tab and then **Picture** in the **Management** group.
3. Locate a picture you want to add and double-click it.

NOTE The picture is automatically sized to fit the picture space.

Add project team members

By assigning project team members such as members of the project team, project partners, customers etc., you are able to distribute the workload of the project to the co-workers and to inform project members which projects they are assigned to or following up its process. Your employees will know for which parts of the business they are responsible.

By setting up a project team, you define access permissions to the project.

1. Open an existing project or create a new one.
2. On the **Management** page, in the **Staff** area do the following:

    - **Assign a project manager** Click **Manager** and then in the **Choose Resource** dialog box choose an address book from the **Address Book** drop-down list. Select from the list one or more names for the project.
    - **Assign a team** Click **Team** and select from the list one or more internal co-workers.
    - **Assign a customer** Click **Customer** and select from the list one or more customer contacts for the project.
    - **Assign a partner** Click **Partner** and select from the list one or more persons, whom you want to add to the project as project partners.
    - **Assign more team members** Click **More** and specify any other contacts, e.g. quality control staff, heads of department or other stakeholders.

NOTES In the **Staff** area, the following possibilities are available:

- Double-click the name of the staff member to open the assigned contact.
- Select a mailing list containing for example all members of the customer's **project team**. Mailing lists are **automatically resolved** by InLoox PM.
- Right click on one of the resources to open the context menu and choose **Delete** or **Delete all items** to remove the name or names. Use **Up** and **Down** to change the order of the names. Click **Details** to open the contact information.
- Use the **quick selection** to add a new resource. Click the **Arrow** in the button to see the drop-down list of all resources that have been added to the project. In the new project, you will see the resources that are involved in the other InLoox PM projects. Click **Delete all contacts** to clear the selection.

- Use **Drag&Drop** to shift a resource to another box, e.g. from the **Partner** box to the **Customer(s)** box by clicking the respective name and dragging it with the mouse to the field.
- Pull out a resource out of the box in order to remove it.
- Press CTRL and drag a resource to another box to copy it.

Add a status and date

Add the following project data in the **Schedule** area to organize your project list more easily:

- **Status** Specify the state of the project development. Choose between **In progress**, **Completed** or **Discontinued**.

  TIPS

  - The display in the project list depends on the status controlls the display of the project list. For more information see Generate personalized views.
  - You can customize a status. For more information see Change the project status.

- **Start and End** Select from the calendar a date for the project start or its end. The current date is preselected when creating a new project. The end date must not be earlier than the start date.

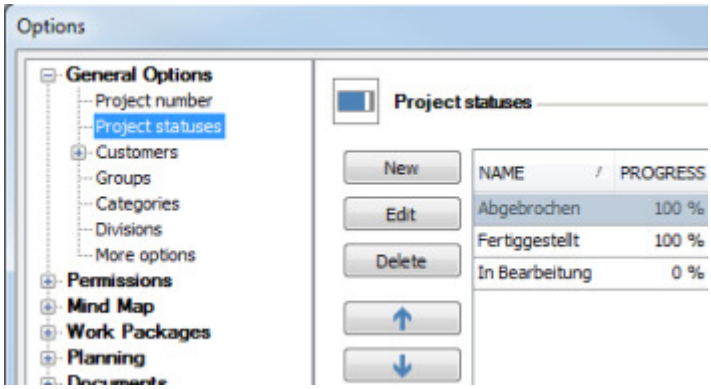
  NOTE The display of the project depends on the project start and end.

Change the project status

The status defines different project states and degrees of completion. You can find the project status in the project, on the **Management** page, in the **Schedule** area.

You can define as many project statuses as you want in the InLoox PM options and connect them to the project progress expressed as a percentage. This is how you do it:

1. Open the dialog box **InLoox PM Options**.
2. Under **General options** click **Project statuses**. On the right side, you will the **Project statuses** area:



3. Do one of the following:

   - Create a new project status by clicking **New**. In the **New Project Status** dialog box, enter a name and a progress (in %). The progress is a percentage figure, i.e. an integer between **0** and **100**.
   - Edit the existing project status. Choose one status from the list and click **Edit**.
   - Remove the selected project status from InLoox PM by clicking **Delete**.
   - You can change the status position in the list. Click **Arrow Up** to move it upwards or **Arrow Down** to move it downwards in the list.

     TIP Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTE The project statuses list contains the name and progress of each state. The sequence of this list corresponds to the sequence displayed in the projects, on the Management page.

WARNING Effects of editing or deleting a status:

- Adding a new status has no effect on existing projects.
- Changing the sequence of states has no effect on existing projects.
- Changes to the state (e.g. name, progress in %) take immediate effect in all relevant projects.
- Deleting a state causes all projects using it to remain without state until the user makes a manual correction.

Create and change comments

Use comments to leave any additional information on the project. Comments contain text-based information and the creator's name, time and date of the entry as well as hyperlinks, symbols or images. InLoox PM allows any number of comments from different persons.

Article content

Create a comment

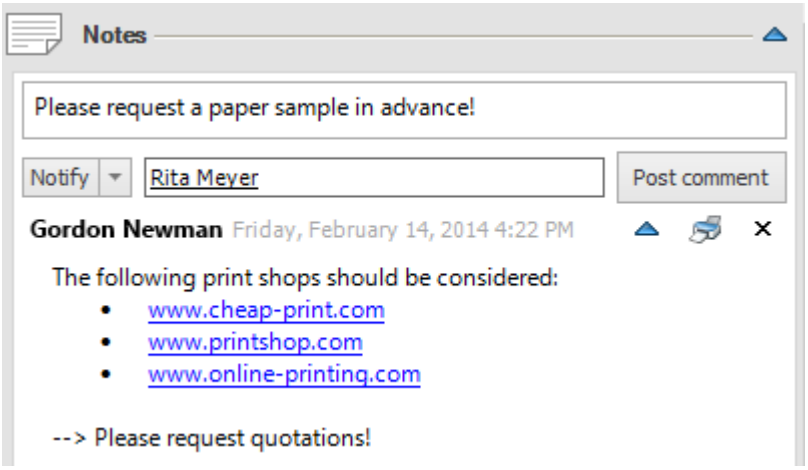
Customize a comment

Create a comment

Create a comment in any project:

1. Open an existing project or create a new one.
2. On the **Management** page, in the **Comment** box, type the comment you want to leave. Enter here for example the project objective, the order type or internal remarks.You can format your text comment and add hyperlinks, symbols and images. Please find the complete instruction in the **Customize a comment** area below.
3. Click **Post Comment**.

IMPORTANT As soon as you save your comment with this command, you cannot edit it again. Now, you see the saved comment in the list below.



TIPPS

- You can send your comment via email to the project manager or team member:

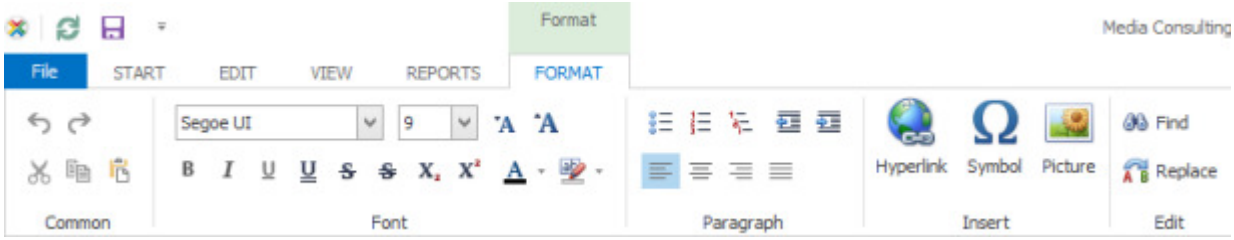
  1. Click Notify in the lower end of comments.
  2. Select a contact from the **Address Book** dialog box and click **Select**. Click **OK**.
  3. You can also use the quick selection by clicking arrow in the **Notify** field. In the drop-down list select the resources, which have been added to the Staff area of the Management project page. For more information about adding a staff, see Add project team members.

- Click the arrow on the right to open it.
- On the **View** tab, in the **Common** group, click **Expand or Collapse** in order to open or close the comments in the comment preview. Click **Expand all** above the comment list as alternative.
- You have, however, the possibility to delete it. Click **Delete** in the comment preview to remove the comment. You need the corresponding permission to do this. For more information about assigning permissions, see Set up permissions.
- Print the comment by clicking **Print** symbol.

InLoox PM always saves the name of the person, who made the changes. InLoox PM displays the Outlook, Windows or InLoox PM account name.

Customize a comment

You can change the appearance of your comments with InLoox PM features. Compose and customize your comment with different fonts, colors, sizes, etc., to arrange the comment information clearly and manage it more easily. All comands for formatting are on the **Format** tab.



Change the font

- On the **Format** tab, in the **Font** group, you can select the font, font size, font style (bold, italic, strikethrough, double strikethrough, subscript, superscript, underline and double underline), font color, and text highlighting.

- You can also increase or decrease the size by one increment, and change the case.

Add a numbered or bulleted list

1. On the **Format** tab, in the **Font** group, click the Bullets or Numbering command.
   Press ENTER to add the next list item.
2. InLoox PM inserts automatically the next bullet or number.
3. To finish the list, press ENTER twice or press BACKSPACE to delete the last bullet or number in the list.

Add further elements

Add hyperlinks, symbols or images to your comments to make your information more visual and to provide information more easily.

1. On the **Format** tab, in the **Insert** group, click one of the following:

   - Hyperlink If you want to link a file, a website or a picture, click **Hyperlink**. In the **Text to display** field enter the text that will be displayed in your comment. In the **Address** field select a file path or enter the URL of a web site.
   - Symbol Using this command, you can enter the following:
     - Symbols that are not on the keyboard, such as ¼ and ©.
     - Special characters that are not on the keyboard, such as an arrow (→) or a dash (—).
     - Unicode characters.

     If you are using an expanded font, such as Arial or Times New Roman, the symbols in the list are displayed then in the selected font. In the list you can also select the language characters, such as Arabic or Russian (Cyrillic) letters, if available.
   - Picture Browse to the folder where the picture that you want to add is saved, select the picture, and then click **Insert**. You can resize the picture directly in the comment.
   - History In the drop-down list you can see the saved text from the other descriptions. You can create new comments or descriptions by using these texts.

Find text

You can quickly search for every occurrence of a specific word or phrase.

1. On the **Format** tab, in the **Editing** group, click **Find**.
2. In the **Find** box, enter the text you want to search for.
3. Do one of the following:
   - Click **Find next** to search for every occurrence of a word or phrase.
   - If you want to search simultaneously for all occurrences of a word or phrase, click **Search: All** and choose between **Match case**, **Find whole words only**, **Regular expression**.

NOTE To cancel a search progress, press ESC.

Replace text

You can quickly search for every occurrence of a specific word or phrase.

1. On the **Format** tab, in the **Editing** group, click **Find**.
2. In the **Find** box, enter the text you want to search for.
3. Do one of the following:

   - Click **Find next** to search for every occurrence of a word or phrase.
   - If you want to search simultaneously for all occurrences of a word or phrase, click **Search: All** and choose between **Match case**, **Find whole words only**,**Regular expression**.

NOTE To cancel a search progress, press ESC.

Add other project information

On the **Edit** tab, in the **Status** group, you can add the following elements to a project:

- **Priority** You can set the level of importance of a project. On the **Edit** tab, in the **Status** group, choose whether the project has **high**, **low** or **normal** priority. Setting the level of importance also enables you to sort the projects in the project list by importance.
- **Fixed deadline** With this command, you can define whether the completion date of the project can be seen in the planning or not. Typical examples of fixed deadline projects are trade fairs or Christmas card mailings.

TIP The project end is marked in red in the planning. For more information, see Work with the Gantt chart, in the Information rules in the project list section.

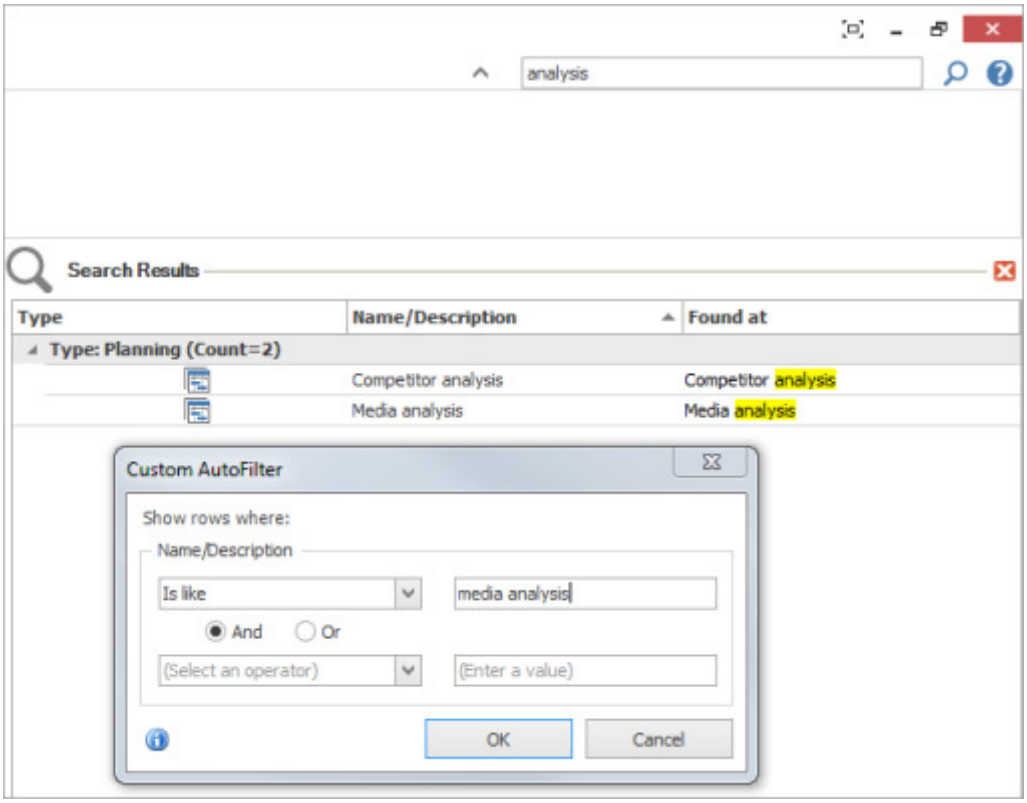
- Archived With this command, you can archive the project. The archived project will be saved in the project archive.
- Lock project This command protects your project from being changed by other users. Only authorized users can change this mode.

TIP For more information, please see Set up permissions.

Search and filter in a project

Over time your project grows, and it can be hard to find quickly the important information. InLoox PM 8 provides you with the search feature in the project directly. It helps you to reach the needed data without a lot of digging. Use the **Search project...** field that is on the top right of each project page.

1. Enter the search term in the search field. On the **Search** tab, select **Only this Page** or **All Pages**.
2. Select **Enter** or the **search icon** .
   The search results are shown on the right bottom. The list is subdivided into three columns **Type**, **Name/Description** and **Found at**.
3. Refine your search by selecting one of the filters in the context menu in each coulmn: **All**, **Custom**, **Blanks** or **Non blanks**.
4. Click **Custom** filter to select the custom filter in each column, e.g. **Adjusted**.
5. In the **Custom AutoFilter** dialog box you can define the values as well as logical operator:



1. Choose one condition, e.g. **is equal**.
   The default filter operator is **and**. You can combine two different logical operators by using the filter operator **or**.

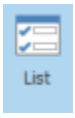
1. Enter a value in the field behind, e.g. analysis.
   InLoox PM filters the project by the selected criteria.

4. You can further refine your search by clicking **Only this Page** or **All Pages** in the **Section** group, at the **Search** tab.
5. Click discard icon in the search results list to clear your the search.
   Or click **Close Search** on the **Search** tab in the ribbon.

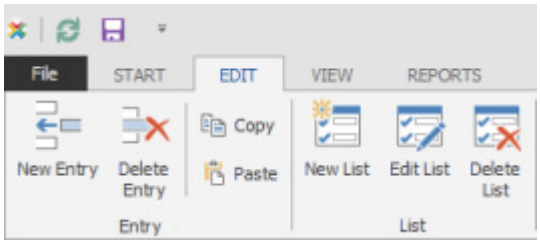
NOTE To use the search results click the linked Type: information. InLoox PM for Outlook will switch to the page, where the result is saved.

List

Work with the list

Click **List** 

to open the **List** page. On this page you will find the following features:



Features on the Edit tab

- **Add new entry** In the **Entry** group click **New Entry**. You can name it directly in the mind map view or by right-clicking the mouse an choosing **Edit** in the context menu.
- **Remove an entry** In the **Entry** group click **Delete Entry** to remove the selected entry from the list.
- **Copy and paste** Create quickly entries with the help of **Copy** and **Paste**, in the **Entry** group.
- **Create a new list** In the **List** group, click **New list**.
- **Edit a list** In the **List** group click **Edit List** to add further information to the selected list.
- **Remove a list** In the **List** group click **Delete List** to remove the selected list.

Features on the View tab

- **Print a list view** In the **Common** group, click **Print** to start the quick print feature of the list view.
- **Expand or reduce the list view** Change the view with the help of **Expand All** or **Collapse All**, in the **Common** group, to make clear the list view.
- **Search the information via analytical filter** In the **Common** group, click **Filter**.
- **Change the view of the list** Select between **List** and **Cards** view in the **View** group.

Features on the Reports tab

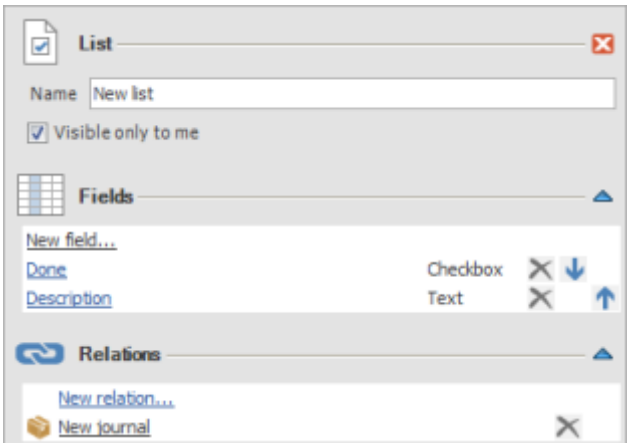
- **Create a report** On the **Reports** tab, in the **Create** group, click **Create Report** to load the mind map data as a report.

Create a new list

You can structure and organize with the list feature all project information even before generating work packages and a timed project plan.

1. Open an existing project or create a new one.

   TIP For more information on how to create a project see Create a project.
2. On the **Start** tab click **List**.
3. On this page you find a new list.
4. On the **Edit** tab, in the **List** group click **Edit List**.
5. On the side panel do the following:



6. Tape a name into a **Name** field.
7. Activate the **Visible only to me** box to hide your list from other users.
8. In the **Fields** area you can add a new field that will be overtaken for the new entry in the list.

    1. Click New field.
    2. In the New Field dialog box type a name in the Name field.
    3. Choose the type from the drop-down list.
    4. Click OK.

NOTE Use Down and Up arrows in the Fields area to define the order of the fields.

9. In the **Relations** area you can add a link to the other elements from the project sides.

    2. Click New relation....
    3. In the Assign Relation dialog box click the wanted tab.
    4. Select the needed project element.
    5. Click Add and then OK.
    6. The assigned relation is now displayed in the Relations area. With one click on it you can open the related project page.

NOTE You can delete each project from the group by clicking **remove** ✕ symbol.

Create and edit an entry

Add new entries to complete the list.

Do the following:

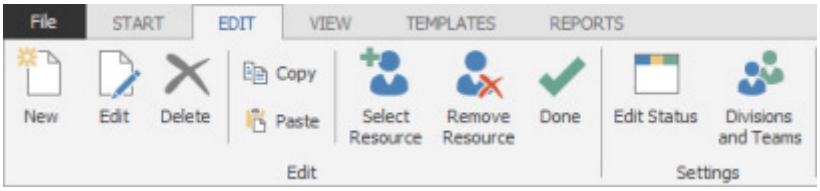
1. In the project, on the **Start** tab, click **List**.
2. In the lower area you can see now a new entry with two fields **Done** and **Description**.
3. You can activate the **Done** field.
4. In the **Description** field enter some important information, e.g. the targeted deliverables or internal remarks.

Work packages

Work with the work package list

In the project, on the **Start** tab, click **Work Packages**

to open the work package list. On this page you will find the following features:



Features on the Edit tab

- **Create new work package** To create a new work package, click on the **Edit** tab in the **Edit** group **New**. To edit an already existed one, select a work package from the list. On the **Edit** tab, in the **Edit** group click **Edit**.
- **Remove a work package** Select one work package you want to delete and click **Delete** on the **Edit** tab in the **Edit** group.
- NOTE Use the multiselection for deleting of the work packages. Click the first one you want and hold the Ctrl key on the keyboard while clicking on all the work packages you want to delete. Then click **Delete** on the **Edit** tab, in the **Edit** group.
- **Assign a resource to the work package** Select a work package from the list and click **Select Resource** in the **Edit** group, on the **Edit** tab.

  TIPS

  - For more information on how to add resources, see Add resources.
  - Click the picture or resource name on the work package in the wok package list to add a resource. Call out the information to the resource which you have already added. In this dialog box you can create a new contact or to get in touch with the resource via email or call.
  - InLoox PM transfers the picture, if a contact has one in the exchange server.
- **Delete resource** Select one resource you want to remove and click **Remove Resource** in the **Edit** group, on the **Edit** tab.
- **Mark work package as done** If you are ready with the work package, click **Done**, in the **Edit** group, on the **Edit** tab. Now you see the Done smybol on the work package in the view. Moreover the work package will be automatically displayed in the Done column of the kanban view.

  TIP To learn more about kanban method, see Manage the work packages via kanban method.
- **Define a status to the work package** You can assign a status to one work package. Select a work package from the list and click **Status**, in the **Edit** group.

Features on the View tab

- **Print a work package list** On the **View** tab in the **Common** group, click **Print** to start the quick print feature of the mind map view.
- **Expand or reduce the work package view** Change the view by using the **Expand All** or **Collapse All** buttons in the **Edit** group, on the **Edit** tab to have a clearly structured work package view.
- **Show resources** On the **View** tab in the **Resources** group click **Resources** to check the resource utilization.

Features on the Templates tab

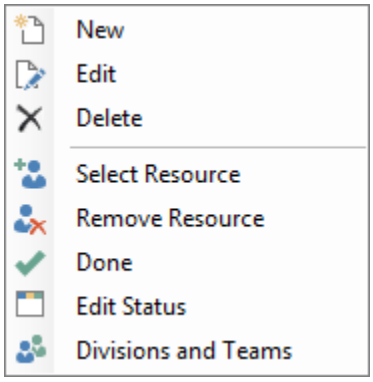
- **Load a saved reports** You can also load a template from the gallery view in the **Work Package Templates** group.
- **Save an existing data of one work package into the gallery** On the **Templates** tab, in the **Work Package Templates** group, click **Save Template** and choose the needed format from the drop-down list. This template will be displayed in the gallery view.
- **Load an existing work package template from your data** On the **Templates** tab in the **Export/Import** group click **Import Template** to load the existing work package from your local data.
- **Save an existing work package as a template in your data** On the **Templates** tab in the **Export/Import** group click **Export Template** to save a work package in your local data.
- **Send a work package via email** On the **Templates** tab in the **Export/Import** group click **Send Template by Email**, to send a mind map e.g. to your colleagues.

Features on the Reports tab

- **Create a report** On the **Reports** tab, in the **Create** group, click **Create Report** to load the mind map data as a report.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the **Work Package** page, such as **New**, **Edit** and **Delete.** It has also features such as **Select** or **Remove Resource** and **Done**, as well as **Status**. Right-click in the time tracking list to open the context menu.



Keyboard shortcut

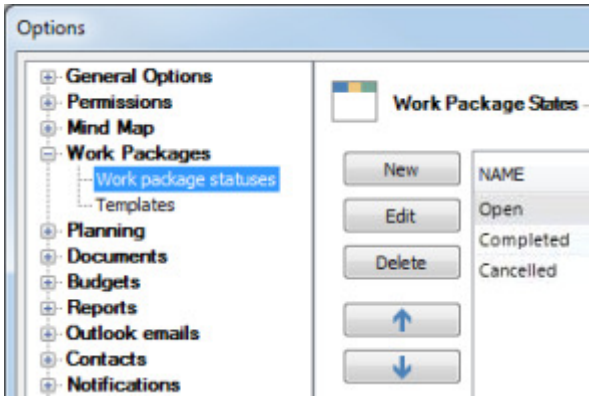
- **STRG+C** Copy a work package into the clipboard.
- **STRG+V** Paste a work package from the clipboard to the work package list.
- **STRG+N** Create a new work package.

Change the work package status

The status defines different work package states. You can find the work package status in the project, on the **Work Packages** page, in the **Edit** group, on the **Edit** tab.

You can define as many statuses as you want in the InLoox PM options. Proceed as follows:

1. Open the dialog box **InLoox PM Options**.
2. Under **General options** click **Work Packages** and then **Work Packages Statuses**. On the right side, you will the **Work Packages States** area:



3. Do one of the following:

- Create a new status by clicking **New**. In the **Edit Work Package Status** dialog box, enter a name anddefine the color in the **Flag** field.
- Edit the existing status. Choose one status from the list and click **Edit**.
- Remove the selected work package status from InLoox PM by clicking **Delete**.
- You can change the status position in the list. Click **Up** to move it upwards or **Down** to move it downwards in the list.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTE The sequence of this list corresponds to the sequence displayed in the projects, on the Work Packages page.

WARNING Effects of editing or deleting a status:

- Adding a new status has no effect on existing projects.
- The new status is visible in the whole system.
- Changing the sequence of states has no effect on existing projects.
- Changes to the state (e.g. name, color) take immediate effect in all relevant projects.
- Deleting a state causes all projects using it to remain without state until the user makes a manual correction.

Create and edit a work package

InLoox PM provides you with the flexible project work. You can create different types of the project planning. One of them is to create the list of the work packages. After you can add the work packages into the Gantt chart and have in this way the scheduled events. You can have your work packages only as a to-do list, without integrating them to the Gantt chart. You can combine both versions of the planning.

1. In the project, on the **Start** tab, in the **Section** group, click **Work Packages**.
2. In the **Start** tab, in the **Section** group click **New** to create a new work package.
   On the right side you can the side panel for editing.

   - General information on the work package in the Basic Information area

1. In the **Name** box type a name for the work package.
2. In the Description box enter some important information, e.g. the targeted deliverables or internal remarks.

TIP **InLoox PM provides you with a range of formatting features. For the detailed description, see** Create and change comments **in the Customize comments section.**

- **Additional Information to the work package from the mind map or planning**
  This area displays the information whether the work package is added from the mind map or it is added to the planning activity. The information is linked. Click on it to open the corresponding page. As soon as you have added the work package to the Gantt chart on the **Planning** page, an additional **Planning**area will be displayed on the right sidepanel of the **Work Packages** Page.

  1. Click the linked name of the work package to open the planning.
  2. In this area you can see now the start and end time.

     NOTE The work package overtakes the date of the planning item. To which it was added. If the work package is a planning item, the date will be overtaken from the item above.

  3. The workload of the work package is also displayed. It can be changed with the changing of the duration of the planning element.

- Budgeting of the work package

  1. In the **Group** dropdown menu choose a group to which the work package belongs. It defines the costs for the activity.
  2. The **Is asset billable** check box is selected automatically to include the resource costs of this work package to the expenses (plan, resources).
  3. Select the **Individual** check box and set an individual hourly rate for the work package. Type the respective values in the **Purchase price** and in the **Selling price** field.

- Adding documents

  1. Click **New link...** to add the document.
  2. In the **Select Entry** dialog box select one document from the list and click **OK**.

3. The added document is displayed in the **Document** area on the side panel. Click it to open this document. Click **Delete** symbol to remove it.

- Sending a notification to a resource

IMPORTANT **All added resources receive automaticallly notifications about new, edit or deleted work packages.**

In the area Notifications, you can inform other resources,e.g. project planner, about assigned work packages and about the changes in them.

  - Click the command ... to add resources.
  - In the **Select Conact** dialog box click on the name and then click **Select** and **OK**.
  - The notification will be send on the selected resource as an email, when sie save and close the project.
  - The email notification set by default. The message contains the following planning data:
    - The name of the work package
    - Project name and number (in the subject)
    - Description
    - Personal duration.

- Adding a note to a work package

1 Select a work package from the work package list.
2 Click the symbole **Full Screen Mode** in the top left.
3 In the text area type your notes below the main information to the work package.
4 You can also send a notification dierctly from the work package. User a quick selection to add project responsibles.

TIP To learn more about adding the responsible persons to the project, see Add project team members.

Resources

Add resources

You can assign work packages to your project team members and determine the distribution of work. You can add only one resource to a work package. Assign work packages using one of these ways.

Article content

Add a resource via dialog box Select Contact

Add ressources from the departments and teams

Add a resource via dialog box Select Contact

1. Select one work package from the list or create a new one.

   TIP See Create abd edit a work package in order to create a new one.

2. In the group Edit click Select Resource.
3. In the Select Contact dialog box choose one name from the list. InLoox PM provides you with the InLoox PM address book as well as with the contacts from Microsoft Outlook and Exchange Server.

   TIPS Do one or more from the following to select effectively the resource:

   - Activate **Show workload** box. If you have activated it once, it will be still activated even by the next opening.
     - In the lower area you can see the workload chart for the selected resource.
     - You can adjust the shown time period in the selected range by moving the slide controls.
     - Activate the **Exchange Calendar** box to see the appointment information from the Outlook calendar.
   - Use the **Skills** feature to assign resources according to their skills. Click the **Search by Skills** drop-down list and select the respective check box. Then select a resource from the list and click **OK**. For more information see Assign skills to resources.

4. Click **OK**.
   In the work pacakge the new name will be displayed.

   NOTE On the **Edit** ta, in the **Edit** group, click **Remove Resource** to delete a resource from the work package.

IMPORTANT All added resources receive automaticallly notifications about new, edit or deleted work packages.

Add ressources from the departments and teams

1. Select one work package from the list or create a new one.
2. Click the **Resource** tab in the side panel.
3. In the **Divisions and Teams** area you have the following possibilities to add resources:

   - Add from the predefined division

     TIP How to add resources to the predefined divisions, see Adjust the division structure.

     - Select a resource from the divisions and drop it in the **No resource assigned** row in the work package.

       IMPORTANT The administrator permissions are needed to add or edit the devisions.

   - Create new teams
     The teams help you to orgnaize the structuring of the reources. You can give them different names in order to find quickly the needed resource.

     IMPORTANT All created teams are visible system wide and only for you. The other users can create their own teams.

     1. Click **plus** symbol in the area below.
     2. In the Add Team field enter a new name.
     3. Click **resource** symbol to add resources.
     4. In the **Address Book** dialog box select a resource and click **Select** and then **OK**.
        InLoox PM provides you with the InLoox PM address book as well as with the contacts from Microsoft Outlook and Exchange Server.

        TIP Use the **Skills** feature to assign resources according to their skills. Click

the **Search by Skills** drop-down list and select the respective check box. Then select a resource from the list and click **OK**. For more information see **below Assign skills to resources.**

5. When you added resources to the team, select one and drop it in the **No resource assigned** row in the work package.

NOTES You have also following features on the side panel to add teams:

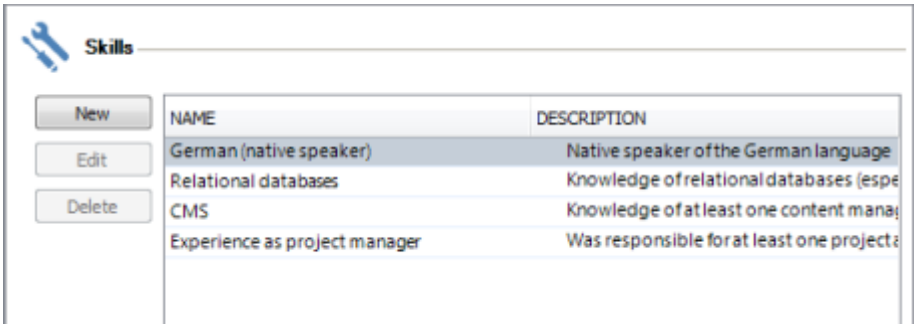
- You can change the name of the group by clicking edit symbol on the left from the team.
- You can delete each team by clicking **remove** symbol ✕.

Assign skills to resources

Using the InLoox PM skill management, you are able to assign any qualifications and skills (such as language skills, special knowledge of industry sectors, certifications and many more) to project members. Consequently, you can search for team members with certain skills in your company and deploy them for specific project tasks.

And this is how you can generate skills in InLoox PM and assign them to certain project members:

1. Open the **InLoox PM options** dialog.
2. Under **Contacts** click **Skills**. On the right side, you will find the **Skills** area as well as the **Skill Assignment** area.



1. Skills
   - To create a new skill, please click **New** in the **Skills** area. In the **New Skill** dialog box, in the **Name** field, you can name the respective qualification and add a description in the **Description** field. Please confirm with **OK** and the newly created skill will appear in the list.

- To adapt an already existing skill click the respective skill in the list and click **Edit**. You are now able to change the naming of the skill in the **Name** field and to change the description of the skill in the **Description** field. Confirm with **OK** and the changed entry will appear in the list.
- To delete an already existing skill permanently, click the respective skill in the list, then click **Delete** and confirm with **Yes**.

2. Skill Assignment

   - Click New in the Skill Assignment area.
   - In the InLoox PM Skill Assignment dialog box, click to select a resource. Mark the respective name in the list and click Select and then OK.
   - Then activate the check box(es) of the skill(s) in the Skills area that you want to assign. Click OK and the newly created assignment will appear in the list.
   - To modify the assignment, mark the respective entry in the Skill Assignment area and click Edit. To select a different resource, click and mark the respective name in the list and click Select, OK. To modify the assigned skills, activate or deactivate the check boxes of the respective skills.
   - To remove an assignment permanently from InLoox PM, mark the entry in the list, click Delete and confirm with Yes.

NOTE As soon as you have created a skill entry in the InLoox PM options and you have assigned it to one or several resources, you can search for the respective skill anywhere you can add a resource in InLoox PM.

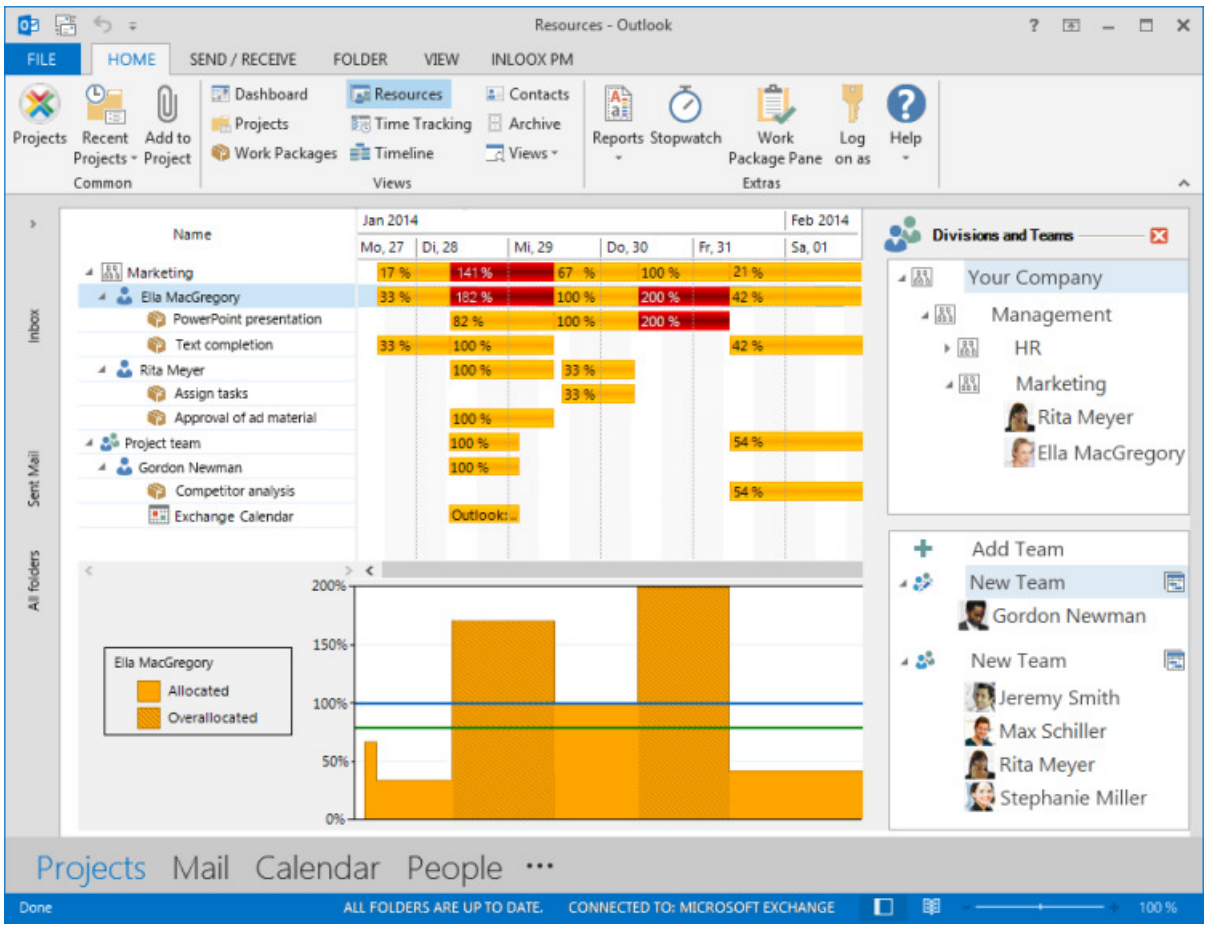
Call up and manage resources

In the resource overview, you can control the resource utilization directly in the project sides **Work Packages**, **Mind Maps** and **Planning**. Resources can be employees or objects used for work such as rooms, vehicles or machines. InLoox PM differentiates between internal resources (i.e. Exchange Server mailboxes) and external resources (i.e. email and fax contacts). InLoox PM uses the free/busy-feature of Microsoft Exchange Server for internal resources and integrates the information (busy, tentative and out of office) into the workload diagram.

The opening of the **Resources overview**:

1. In the project, on the Start tab, click **Work Packages**, **Mind Maps** and **Planning**.
2. Then on the **View** tab, in the **Resources** group click **Resources**.

TIP The description of the features from the dialog box can be found here Work with resources.



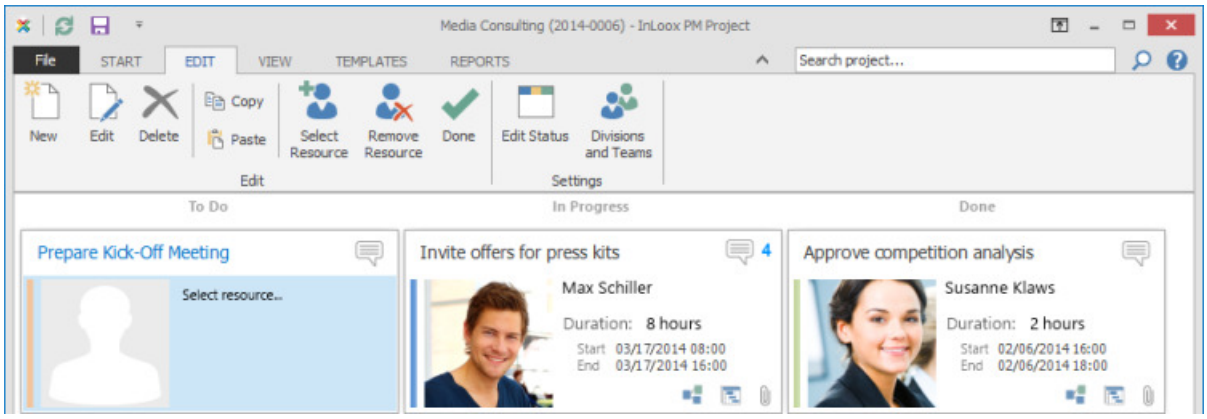
The description of the other features:

- Define the time frames of the utilization Select the datum in the Date Range group or click Today.
- Display resources project-related or system-wide In the Filter group, choose between All Projects or Only this Project.
- Show details of the elements Choose one element from the utilization view in the structure and click Open.
- Show or hide the details in the structure Click Expand or Collapse all in the View group.
- Print the utilization view In the View group, click Print to start the quick print feature.

Manage the work packages via kanban method

Agile teams can now organize their own work packages via freely configurable kanban view. With the kanban method you can quickly and efficiently complete your tasks. Moreover you have an overview

about the processing status of your work packages. A further advantage of kanban is that the project tasks are organized as the individual work steps.



You can work with kanban as follows:

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Work Packages**.
3. On the work package list, the following statuses as **Not Yet Started**, **In Process** and **Done** are set by default.
4. Add new work packages. On the **Edit** tab, in the **Edit** group, click **New**.
5. You can easily change a status by moving the work package via **drag&drop**.
6. You can add new columns with new status to the kanban. On the **Edit** tab, in the **Edit** group, click **Status**.

   NOTE This new status is visible only for this project. If you want to add or change a status for the whole system, see Change the work package status.

7. On the side panel, click **New status...**.
8. On the **Edit Work Package Status** dialog box, in the **Name** field, enter a new name. In the **Flag** filed define the color for the status.

NOTES

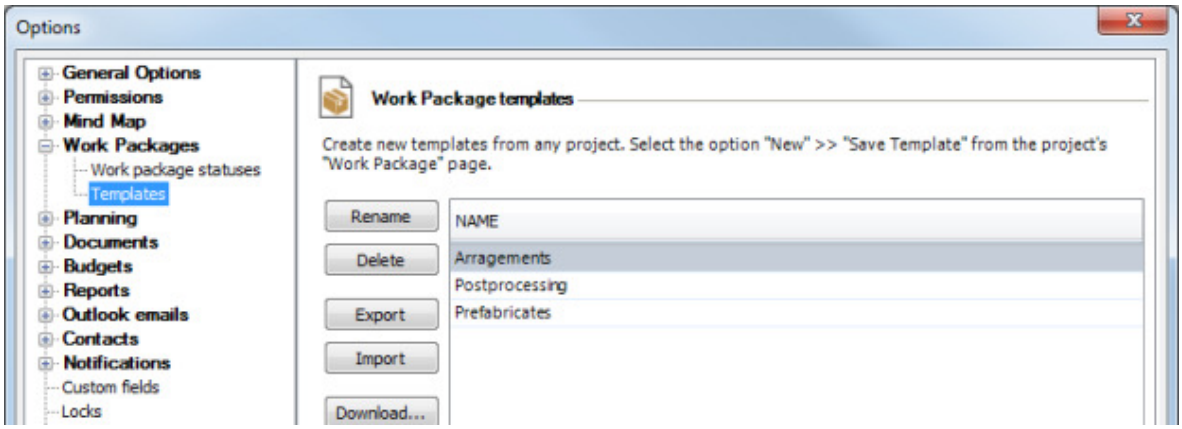
- The color helps to quickly distinguish the status of the work package. You can change it in the Edit Work Package Status dialog box.
- Change the order of the statuses on the side panel by moving the arrows Down and Up.
- You can delete each status from side panel by clicking Remove symbol .
- All work packages displayed in the right column of the kanban view, are done.

Manage work package templates

In the InLoox PM options, you can edit work package templates that are created in the projects. On the Work Packages page you can save a new template. On the**Template** tab, in the **Work Package Templates** group, click **Save Template**.

IMPORTANT To manage the mind map templates, you need InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.
2. Under **Work Package** click **Templates**. On the right side you see the **Work Package templates** area.



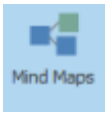
3. Perform one of the following actions:

   - Change the name of the saved template. Choose one template from the list and click **Rename**. In the **Rename Work Package template** dialog box, in the **New Name** field, type a new name for this template and click **OK**.
   - Remove a template permanently from InLoox PM. Choose one template from the list and click **Delete**.
   - Save a template in your local data, e.g. to send it to other users. Click **Export** and choose a local storage location on the **Save Work Package template** dialog box to save the template. Click **Save**.
   - Load a template from your local data. Click **Import** and choose a template in the **Import File** dialog box, then click **Open**.
   - Click **Download** to download the mind map templates from the InLoox website.

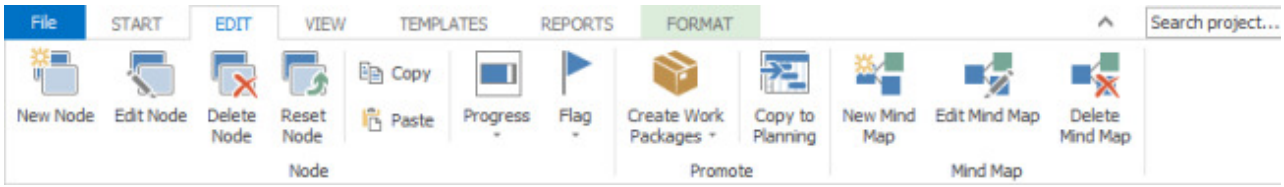
4. Click **OK** or **Apply** to save the changes in InLoox PM.

Mind maps

Work with the mind map

Click **Mind Maps** 

to open the **Mind Map** page. On this page you will find the following features:



Features on the Edit tab

- **Add new node** On the **Edit** tab in the **Node** group click **New Node**. You can name it directly in the mind map view or by right-clicking the mouse an choosing **Edit**in the context menu.
- **Edit a node** On the **Edit** tab in the **Node** group click **Edit Node** to add further information to the selected node.
- **Remove a node** On the **Edit** tab in the **Node** group click **Delete Node** to remove the selected node from the mind map.
- **Copy and paste** Create quickly child nodes with the help of **Copy** and **Paste** in the **Node** group on the **Edit** tab.
- **Set a progress to the node** On the **Edit** tab in the **Node** group click **Progress** and choose the percentage figure from the drop-down list.
- **Mark the node** On the **Edit** tab in the **Node** group click **Flag** and select a color from the drop-down list.
- **Add a new work package to the project** On the **Edit** tab, in the **Promote** group, click **Create Work package**.

- **Copy mind map to planning** On the **Edit** tab in the **Promote** group click **Copy To Planning** to transfer all nodes and the structure to the planning.
- **Create a new mind map** On the **Edit** tab in the **Mind Map** group click **New Mind Map**.
- **Edit a mind map** On the **Edit** tab in the **Mind Map** group click **Edit Mind Map** to add further information.
- **Remove a mind map** On the **Edit** tab in the **Mind Map** group click **Delete Mind Map** to remove the selected mind map.

Features on the View tab

- **Print a mind map view** On the **View** tab in the **Common** group, click **Print** to start the quick print feature of the mind map view.
- **Expand or reduce the mind map view** Change the view with the help of **Expand All** or **Collapse All** in the **Common** group on the **View** tab to make clear the mind map view.
- **Restore the mind map view** On the **View** tab in the **View** group click **1:1** to set back the original zoom level.
- **Enlarge or reduce the mind map view** On the **View** tab in the **View** group click **Zoom In** or **Zoom Out** to change the zoom level of the view.
- **Zoom the mind map** On the **View** tab, in the **View** group click **Fit to Screen**.
- **Show resources** On the **View** tab in the **Resources** group click **Resources** to check the resource utilization.

Features on the Templates tab

- **Load a saved reports** You can also load a template from the gallery view in the **InLoox PM Templates** group.
- **Save an existing data of one mind map into the gallery view** On the **Templates** tab, in the **Templates** group, click **Save Template** and choose the needed format from the drop-down list. This template will be displayed in the gallery view.
- **Load an existing mind map template from your data** On the **Templates** tab, in the **Export/Import** group, click **Import Template** to load the existing mind map in your local data.

- **Save an existing mind map as a template in your data** On the **Templates** tab, in the **Export/Import** group, click **Export Template** to save a mind map, in order to insert it as a picture or in other format to PowerPoint, Word or in the other project.
- **Send a mind map via email** On the **Templates** tab, in the **Export/Import** group, click **Send Template by Email**, to send a mind map e.g. to your colleagues.

Features on the Reports tab

- **Create a report** On the **Reports** tab, in the **Create** group, click **Create Report** to load the mind map data as a report.

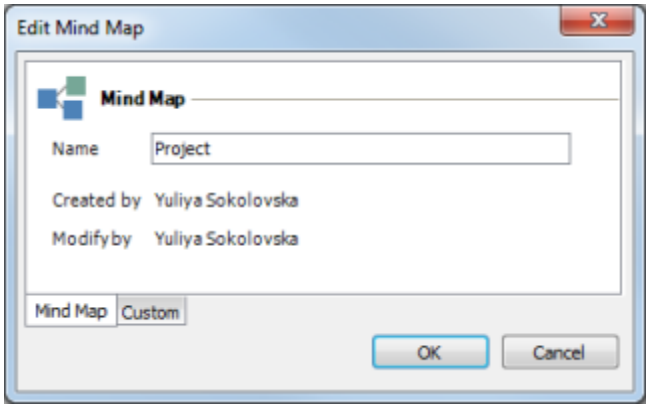
Features on the Format tab

- **Format the mind map** On the **Format** tab in the **Format** group you can customize **font**, **background** and **frame color** of the selected node.
- **Format the child node** On the **Format** tab in the **Format** group click **Assign Format to Child Nodes** to apply the selected format of the mind map to the child nodes.
- **Add a symbol to the node** Select one node from the mind map and choose symbol from the **Symbols** gallery view, on the **Format** tab, in the **Symbols** group.
- **Add or delete a picture to/from a node** Select a node and then click **From File** to select a picture. Click **Remove** to delete it.

Create a mind map

On the mind map page of the project, you can collect and organize ideas and information visually. In a mind map, you always have all ideas, concepts and drafts at a glance.

1. Open an existing project or create a new one.
2. In the project, on the **Mind Maps** page you find a new mind map.
   In the **Edit** tab, in the **Mind Map** group, click **Edit Mind Map** to assign a name. You can also add a new name by right-clicking the mouse, and then clicking **Edit Mind Map** in the context menu.
3. In the **Edit Mind Map** dialog box, in the **Name** field, type a name for your mind map.



4. In this dialog box, click **Custom** to edit custom fields, which have been already saved in InLoox PM.

Create another mind map

1. To create another mind map in your project you can use the following possibilities:
   - In the **Mind Map** group click **New Mind Map** .
   - Right-click the mouse and choose **New Mind Map** from the context menu.
   - Click in the lower menu bar.
   - Keyboard shortcut Press STRG+M to create a new mind map.
2. For further information on how to enter data in the opened **New Mind Map** dialog box, please see the upper part of the article.

Create and edit a node

A mind map consists of different nodes, which are connected to the parent nodes. A name of a new mind map is automatically set as the name of the central node.

TIP For more information on how to create a new mind map, please see Create a mind map.

Structure your mind map by adding new nodes or editing the existing ones.

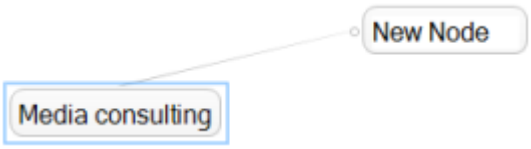
Article content

Add a node

Edit a node

Add a node

1. Choose one of the following options to create a new node:
    - On the **Edit** tab, in the **Node** group, click **New Node**.
    - Right click on the **Mind Maps** area and click **New Node** in the context menu.
    - Use the keyboard shortcut STRG+N.
2. In the **Mind Maps** area, the new node will be displayed, which is connected with the node that is currently selected.



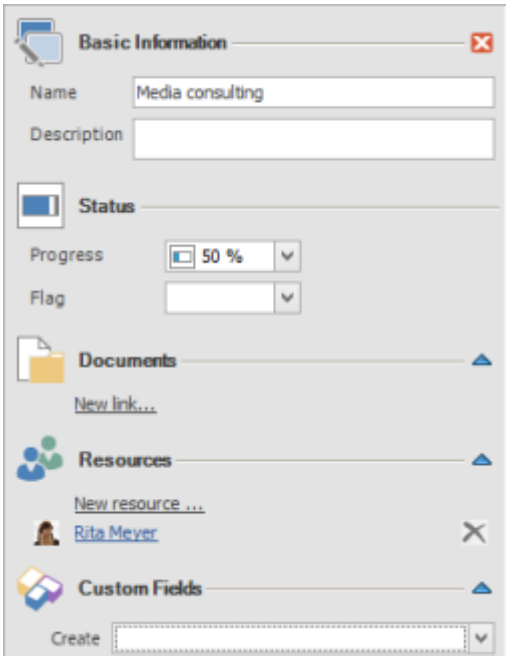
3. You can label the new node.

NOTES

- Create your mind map faster by adding new nodes by using **Copy** and **Paste** in the **Node** group.
- Drag and drop a node at any position on the mind map. to freely

Edit a node

1. Choose one of the following options to edit a node:
    - In the **Node** group, click **Edit Node**.
    - Right-click the mouse in the **Mind Maps** area and click **Edit Node** in the context menu.
2. On the right side you can the side panel for editing:



- General information to the node

    1. In the **Name** box type a name for the work package.
    2. In the Description box enter some important information, e.g. the targeted deliverables or internal remarks.

    TIP InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.

- Highlighting the node and defining its progress

    1. Click **Progress** to display a list of different degrees of completion and choose the suitable degree.
    2. Choose from the **Flag** list a color to mark the node in the mind map.

- Adding documents

    1. Click **New link...** to add the document.
    2. In the **Select Entry** dialog box select one document from the list and click OK.

TIP All displayed documents in the dialog box are saved on the Documents page. For more information on how to add the document to the project, see Create and edit a document.

- Adding resources

    1. Click New resource.
    2. In the Address Book dialog box select a contact and click OK.
    3. Now you see the added resource in the Resource area. Click it to open the contact details. You can also open the details from the node by clicking theResource symbol on it.

Create a work package in the mind map

In the mind map you can create new work packages from the nodes. Proceed as follows:

1. Open an existing project or create a new one.
2. In the project, in the **Start** tab, click **Mind Maps**.
3. Create a new mind map.
4. On the **Edit** tab, in the **Promote** group click **Create Work** Packages.
5. Select on of the following options:

    - All Nodes All nodes together with the main node of a mind map promote to work packages.
    - End Nodes All end nodes of a mind map will be added as new work packages.
    - Selected nodes Select the nodes you want to have as work packages.
    - Include already promoted nodes Select this option to add nodes, which have already work packages, once more.

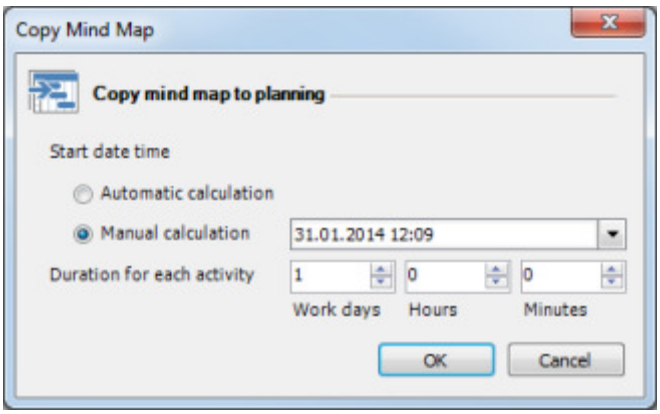
6. After you have selected the option you wanted the **Work Package** Page with new work packages will be automatically displayed.
   On the nodes you can see a Work Package icon.

TIP For more information, on how to add important informations to a new work package, see Create and edit work package.

Copy a mind map to the planning

The mind map data can be copied to the planning. Each node will be an activity in the planning.

1. On the page **Mind Maps**, in the **Edit** tab, in the **Mind Map** group, click **Copy To Planning**.
2. In the **Copy Mind Map** dialog box, in the **Copy Mind Map to planning** area, do one of the following:



   - Define the start date time for the project planning.
   - Define the duration for each activity.

3. In the **Copy Mind Map** dialog box, in the **Resource's details** area, perform one of the following actions:

   - Choose one of the notification types in the **Notification** drop-down list.
   - Define the work amount for the resources. The workload can be allocated as follows:

     - Workload is **applied for each resources** All resources will have a capacity utilization of **100 percent**.
     - Workload is **equally split to all resources** The total workload will be distributed equally to each resource.

4. Click **OK**.

Import a mind map template

Mind map templates accelerate the creation of mind maps. Templates contain predefined nodes and resource data.

TIP For more information on how to save a template, see Save a mind map template. Mind map templates accelerate the creation of mind maps.

Load the already available data to a new mind map.

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Mind Maps**.
3. On the **Mind Map** page, on the **Templates** tab, in the **Action** group, click **Import Template**.
4. In the drop-down list choose one of the following formats:

    - MS Project File
    - MS Project Exchange File
    - MindManager MMAP File
    - MindManager XML File
    - XML File
    - InLoox PM Mind Map File

    These formats allow you to load the template from your local data.

5. You can also select the saved templates in the **InLoox PM Templates** group in the gallery view.

Export a mind map template

You can save a mind map as a template in order to re-use it for other projects.

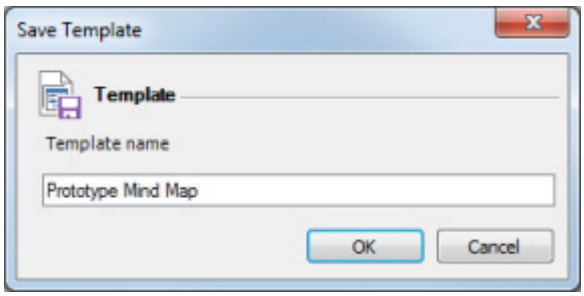
Save the selected mind map as follows:

1. Open an existing project or create a new one.
2. In the project, in the **Start** tab, in the **Section** group click **Mind Maps**.
3. On the **Mind Maps** page, in the **Template** tab, in the **Action** group, click **Save Template**.

4. In the drop-down list you can choose between the following formats:

   - InLoox Mind Map File
   - XML File
   - Picture
   - Vectorgraphics. Use this format in any other file you want and edit it. With copy & paste you can easily export the mind map structure as a vectographic.

5. By choosing the **Save Template** command, in the Action group, the **Save Template** dialog box will be displayed.



6. In the **Enter the name of the template** field, type a name.
7. Click **OK**.
   The saved template is displayed on the **Mind Maps** page, on the **Template** tab, in the **InLoox PM Template** group, in the gallery view.

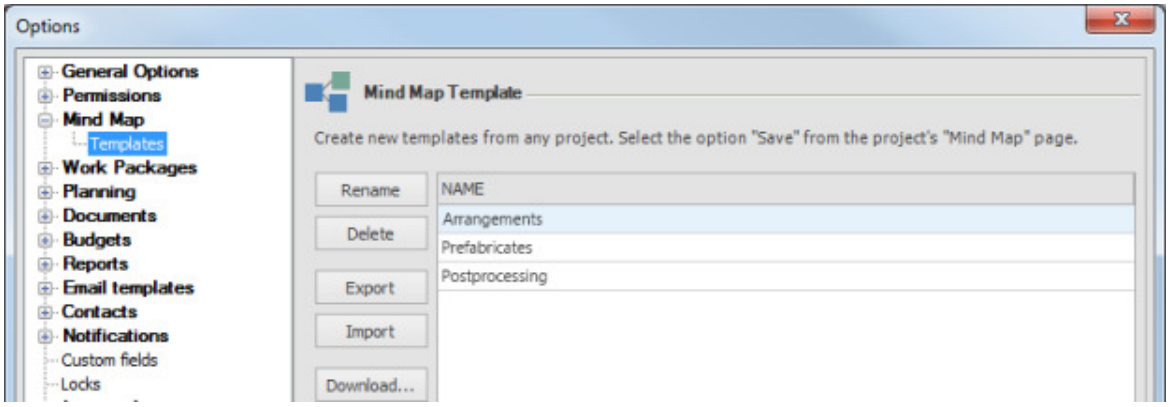
TIP For more information on how to change a template, see Manage mind map templates.

Manage mind map templates

In the InLoox PM options, you can edit mind map templates that are created in the projects.

IMPORTANT To manage the mind map templates, you need InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.
2. Under **Mind Map** click **Templates**. On the right side you see the **Mind Map Templates** area.



3. Perform one of the following actions:

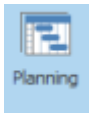
   - Change the name of the saved template. Choose one template from the list and click **Rename**. In the **Rename Mind Map Template** dialog box, in the **New Name** field, type a new name for this template and click **OK**.
   - Remove a template permanently from InLoox PM. Choose one template from the list and click **Delete**.
   - Save a template in your local data, e.g. to send it to other users. Click **Export** and choose a local storage location on the **Save Mind Map Template** dialog box to save the template. Click **Open**.
   - Load a template from your local data. Click **Import** and choose a template in the **Load Mind Map Template** dialog box, then click **Open**.
   - Click **Download** to download the mind map templates from the InLoox website.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Planning

Work with the planning

InLoox PM facilitates to edit your project planning in a time-saving way. Combine project planning with the work packages for the detailed project planning. Create project groups to overview the deadlines and resource capacity over the projects. Find out more about the features on the InLoox PM Ribbon that allow you to create and edit the planning.

In the project, on the **Start** tab, click **Planning** 

to open the **Planning** page. On this page you will find the following features:

Article content

Features on the Edit tab

Features on the Reports tab

Features on the View tab

Features on the Templates tab

Features on the Settings tab

Features on the Edit tab

- **Create and edit an activity** To create a new activity, click on the **Edit** tab in the **Edit** group **New activity**. To edit an already existed activity, select an activity from the planning list. On the **Edit** tab, in the **Edit** group click **Edit**.
- **Create and edit a milestone** To create a new milestone click **New Milestone** on the **Edit** tab, in the **Edit** group. To edit an already existed one, select a milestone from the planning list and click **Edit** in the **Edit** group.

  TIPS Use the multi selection for simultaneous editing of the planning elements. Click the first planning element you want to edit and hold the Ctrl key on the keyboard while clicking on all the planning elements you want to edit. Then click **Edit** on the **Edit** tab, in the **Edit** group.
- **Remove a planning element** Select the planning element from the planning list you want to remove. On the **Edit** tab, in the **Edit** group, click **Delete**.
- **Assign or delete a work package** Select a planning element from the planning list and click **New Work Package**, in the **Edit** group, on the **Edit** tab.
  If you want to delete the work package, click **Remove Work Package**, in the **Edit** group. A planning element contains now an assigned work package.
- **Create your planning faster** Use the **Copy** and **Paste** commands from the **Edit** group on the **Edit** tab to copy already existing planning elements and insert them into a new planning. You can edit the newly created elements as you want.

- **Change the order of the planning elements** Use the arrows **Up** and **Down** in the **Arrange** group. By clicking on these vertical arrows, you can move the selected item up and down in the list.
- **Group the planning elements** Create or dissolve a group by using the arrows **Left** and **Right**, in the **Arrange** group.
    - The selected planning element will be grouped one level below by clicking **Right**.
    - Click **Left** to move the selected planning element one group level up.
- **Mark a planning element as done** Select an activity or milestone from the planning list, which is finished, and click **Done** in the **Highlight** group on the **Edit** tab.
- **Highlight a planning element in the planning list** Select one planning element from the planning list and click **Flag** in the **Highlight** group on the **Edit** tab. Choose one color from the drop-down list. Now you can see the selected flag in the planning list next to the element.

  NOTE The flag highlights the planning elements only in the list.
- **Highlight a planning element in the Gantt chart** Select one planning element from the planning list and click **Color** in the **Highlight** group on the **Edit** tab. Click the color circle to select a user-defined color from the color spectrum. Click the arrow to see a compact pre-selection of standard colors. The planning element will be displayed in the Gantt chart in the selected color.
- **Display the important planning elements on the timeline** Select planning elements you need and click **Add to timeline**, in the **Highlight** group.
- **Synchronize a planning element with Outlook elements** Select one element from the planning list and click **Synchronize with** in the **Action** group on the **Edit** tab. Select either **Outlook Task** or **Outlook Calendar** from the drop-down list.
- **Create planning snapshot** Record the current state of your Gantt planner at different times. Click **Snapshot** in the **Action** group, on the **Edit** tab.
- **Link quickly planning elements** Select planning elements you want to link and cick **Link Automatically**, in the **Action** group. Such type of planning is called waterfall planning.

  TIP You can adjust the constrains between planning elements by clicking dependency in the Gantt chart. For more information, see Create dependencies between planning elements, in the Edit dependencies in the Gantt chart.
- **Remove the defined constraints of planning elements** Select from the planning list an element with time constraints and click **Remove Constraint** in the **Action**group, on the **Edit** tab.

- **Remove the dependency between planning elements** Click **Remove Dependency** in the **Actions** group on the **Edit** tab. The defined dependency will be deleted and you can move the elements as you like.

NOTES

- You can undo an action, e.g. if you have accidently deleted one planning element. On the top left Planning page click **Undo**.
- You can repeat the last action by clicking **Redo**.

Features on the View tab

- **Print a planning** On the **View** tab in the **Common** group, click **Print** to start the quick print feature of the planning. In the Print Planning box, in the Ribbon, in the Print Range group, define the time period as well as other table settings. In the **Table** group click **Columns** and select some for the print review.
- **Expand All / Collapse All** On the **View** tab, in the **Common** group, click **Collapse All** to minimize a group in the planning. Click **Expand All** to display it in the detail. Use this feature to get a better overview of your planning.
- **Choose fields** This feature sorts and organizes the project planning by selected data.
- On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column headers.
- Reset the field per Drag and Drop back into the dialog box.
- **Show critical path** On the **View** tab, in the **Details** group, click **Show critical path**.

  TIP For more information, see Show the critical path.
- **Display slack** On the **View** tab, in the **Details** group, click **Display slack**. Now you can see for how many days you can postpone the regarding planning element until it affects the overall duration of the project.
- **Today** Click **Today** in the **Change to** group to switch to the today's view. The plan is positioned so that the **red** day line is on the left side of the Gantt chart.
- **Display All** Click **Display All** in the **Zoom** group to adjust the date interval of the Gantt chart to the project end or start - first and last element.
- **Display the selected planning element only** Select a planning element from the planning list. On the **Zoom** tab, in the **View** group click **Display Selected**.

- **Zoom** On the **View** tab, in the **Zoom** group click **Zoom in** or **Zoom out** to change the Gantt chart view. The following time intervals are available: years, quarters, months, weeks, days, hours, quarter-hours, and minutes.
- **Sort** You can define the view of the project list by sorting it by criteria such as **Name**, **Start date**, **End date** or **Progress**. On the **View** tab, in the **Arrange** group, click**Sort by**. Select a criteria from the drop-down list, e.g. **Is critical**.
- **Group** On the **View** tab, in the **View** group, click **Group by**. In the drop-down list click on the field you want to group by. The project list will be grouped by the criteria you have chosen.

  NOTE You can remove the grouping by clicking **None** in the **Group by** drop-down list.
- **Filter** On the **View** tab, in the **Arrange** group, click **Filter by**. Select the filter criteria from the drop-down list. Only those planning elements will be displayed in the planning list, which contain the selected criteria.
- **Define outline level** Click **Outline Level** in the **Arrange** group, on the **View** tab. Select an outline level from the drop-down list to collapse or expand groups in the planning view.
- **Show resources** On the **View** tab in the **Resources** group click **Resources** to check the resource utilization.

Features on the Templates tab

- **Create your planning by using templates** Use a previously saved planning as a template. On the **Templates** tab, in the **Action** group, click **Import Templates** or choose a saved one in the **InLoox PM Templates** group from the gallery view.

  TIP For more information on templates, see the category Planning templates.
- **Save an existing planning as a template in your data or in a gallery view** On the **Templates** tab in the **Export/Import** group click **Export Template** to save a mind map, in order to insert it as a picture or in other format to PowerPoint, Word or in the other project. You can also save the existing planning by clicking **Export Template** in the **InLoox PM Templates** group, on the **Templates** tab.
- **Send a planning as a template via email** On the **Templates** tab, in the **Action** group, click **Send Template by Mail**. In the opened email, enter the recipient and additional text if you like and click **Send**. The planning is already attached to the email.

Features on the Reports tab

- **Create a report** On the **Reports** tab, in the **Create** group, click **Create Report** to create the planning data as a report.

- **Load a report** Select the report from the gallery view by clicking it, in the **Report** group.

Features on the Settings tab

- Change planning direction On the Edit tab, in the Settings group, click Direction. Select a planning direction, e.g. Forward Scheduling or Backward Scheduling. Then add the Project Start or End.
- Stop sending notifications On the Edit tab, in the Settings group click No Notification. Notifications with project information or regarding project changes will not be sent to the project resources.
- Create project group On the Edit tab, in the Settings group click Project Group. With this feature you can connect the plans of interdependent projects to identify cross-projects dependencies and resource bottlenecks.

Work with the Gantt chart

Get a visual overview of upcoming tasks and the utilization of resources. InLoox PM provides you with different features to adjust the Gantt chart in a quick and comfortable way.

IMPORTANT If you have no reading permissions, you cannot see planning elements in the Gantt Chart.

Article content

General features of the Gantt chart

Description of the symbols

General features of the Gantt chart

The following features for changing and editing the planning can be found in the Gantt chart:

- **Edit a planning element directly in the planning list** You can change the name and the time frame of the element directly in the planning. Click on the planning element row that you want to change and enter the new values.
- **Change the position and duration of planning elements** Press **CTRG** and drag the predecessor / successor relationship between activities and milestones with the mouse.
- **Define the duration and work load of the work package** Use the **Work duration** and **Workload** fields in the planning list.

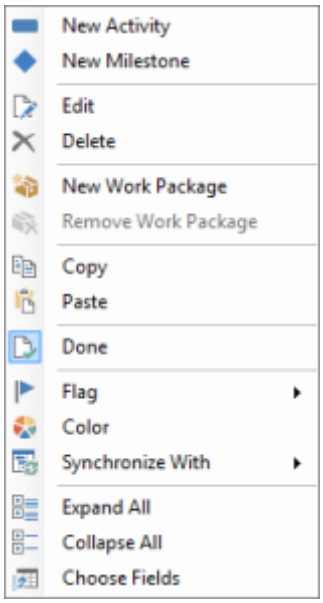
- The **Work duration** field displays the planned duration. It can be set by project planer.
- The **Workload** field displays the actual duration of the work package. A resource can edit it.
- The project planer can be informed about actual duration. Then he adjust the distribution of the resources.

  TIP For more information on how to use the fields, see Work with the planning, in the Features on the View tab.

- **Move or extend planning elements** Keep the **SHIFT** key on your keyboard pressed and drag the planning element in the required position. So, the successor and predecessor will not be influenced by the changes.
- **Center the selected planning elements** Click on the selected element in the Gantt chart.
- **Zoom in and out the view** Press **CTRG** and scroll the mouse wheel for zooming.
- **Edit dependency** Double-click on the link line in the Gantt chart. The **Edit Dependency** dialog box is displayed, where you can change the type of dependency and the lag.

Features in the context menu

The context menu provides you with almost all basic features that are also on the Planning page, such as **New Activity**, **New Milestone**, **New Workpackage**or **Remove Workpackage**, **Edit**, **Delete**, **Done**, **Flag**, **Synchronize with**. It has also such features as **Expand** and **Collapse All**, **Choose Fields**, **Copy** and **Paste**. Right-click in the Gantt chart to open the context menu.



Information rules in the project list

- The current time is represented by a vertical yellow line.
- The project end is marked in red.
- A time period is then in red in the planning, if the planning elements are over the project end in the planning.
- A blue bar shows the status of the activity in percent (%).
- Working times within start and end dates of the project are colored with a white background.
- Non-working times are colored in grey.
- If you add a work package to the planning, you will see its workload in the Gantt chart.
- InLoox PM allows you to start your planning earlier than the project start and to finish it later than the project end. In both cases, the planning for this time period is colored in red.

Keyboard shortcut

- **CTRG+N** Create a new activity.
- **CTRG+N** Create a new milestone.
- **CTRG+A** Select all planning elements.
- **CTRG+C** Copy a planning element into the clipboard.
- **CTRG+V** Paste a planning element from the clipboard to the Gantt chart.
- **CTRG+arrow to right** Moves the selected element to right.
- **CTRG+arrow to left** Moves the selected element to left.
- **CTRG+arrow upwards** Moves the selected element upwards.
- **CTRG+arrow downwards** Moves the selected element downwards.
- Mark the last element in the project plan**+arrow downwards** Creates new planning element.
- **Insert** Inserts new planning element.

NOTE **If the lock icon is displayed on a planning element, you cannot edit it as the other user now work on it.**

Description of the symbols

Symbol	Description
	A check mark shows that the element is marked as completed.
	An alert shows that the element is already overdue and has not been completed yet.
	A flag is used to highlight specific elements.
	The symbol resource shows that resources have been assigned to the element.
	The symbol resources have finished work shows that all resources assigned to the element have completed their tasks.
	A paper clip shows elements to which documents are linked.
	The calendar symbol if constraints have been set for the respective planning element. TIP For more information, see Create planning elements.
	InLoox PM communicates a conflict with this symbol, if a predecessor will be moved.

Create planning elements

Topics

Create and edit an activity

Create and edit a milestone

Create and edit a summary activity

Work with the work packages in the planning

Create dependencies between planning elements

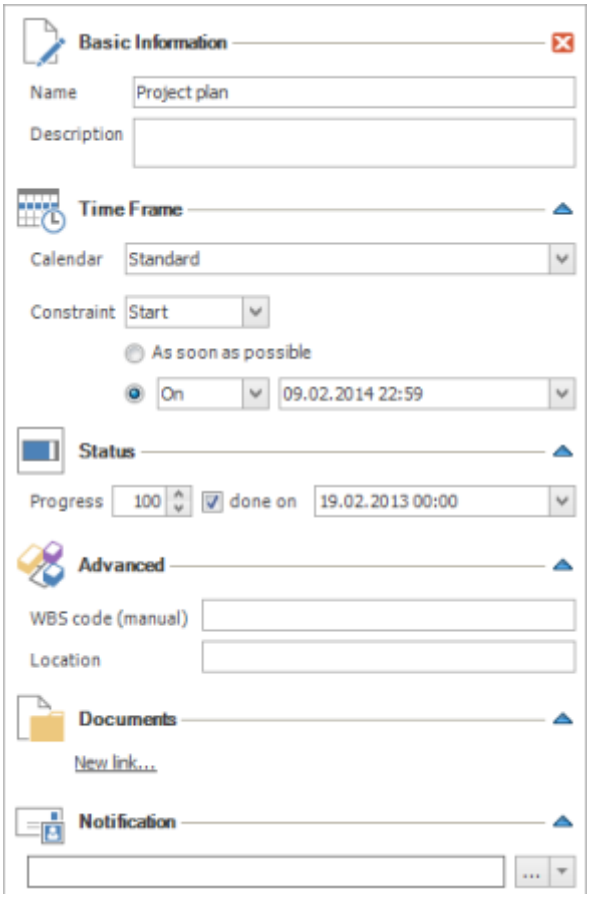
Backward scheduling

Create and edit an activity

It is recommended to divide the planning into activities. An activity is a planning element with a defined start and end date or a defined duration which is narrowed down content-wise by the underlying work packages. Please follow these steps to divide the planning into several activities:

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Create a planning by adding activities. In the **Planning** page, in the **Edit** group, click **New Activity**.

   NOTE Create your planning faster by adding new activities by using the **Copy** and **Paste** feature in the **Edit** group.
4. In the side panel, on the **Edit** tab, you can adjust the activity to your requirements:



- General information to the activity in the Basic information area

  1. In the **Name** box, type a name.
  2. In the **Description** field enter some important information on the activity, e.g. the targeted deliverables or internal remarks.

     TIP InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.

- Time conditions to the activity in the Time frame area

  Define its duration and dependencies regarding other planning elements.
  The current date will be set by default in the new project.

  1. Select **Standard** as a calendar or choose a user-defined working time calendar from the list in the **Calendar** box.
  2. In the **Duration** box, enter the duration in days and enter the hours in the box on the right side.
  3. In the **Schedule** box, define the constraints of the activity. Choose between **Start** or **End**.

4. The constraint **As soon as possible** is set up as default value for the **Start** and **As late as possible** for the **End**. InLoox PM will automatically display the calculated date in the **Time frame** section.
5. Choose below, if you want to set your own date and the constraints. In the drop-down list choose between **On**, **No earlier than**, **No later than**.

- Processing status of the activity in the Status area

  Define the progress or activate the **done** check box to display the processing status of the activity.

- More information on the activity on the Advanced area

  1. In the **Location** field, enter a location.
  2. In the **WBS code** box, enter a work breakdown structure code to identify activities and milestones in large projects. In this case you can define the subsumption.
  3. You can use the field with the automatic WBS code in the project list.

- Add a document to the activity

  1. Click **New link...** to add the document.
  2. In the **Select Entry** dialog box select one document from the list and click OK.
  3. The added document ist displayed in the **Document** area on the side panel. Click it to open this document. Click **Delete** symbol to remove it.

- Sending a notification to a resource

  IMPORTANT **All added resources receive automatically notifications about new, edit or deleted activities.**
  In the area Notifications, you can inform other resources,e.g. project planner, about assigned work packages and about the changes in them.

  - Click the command ... to add resources. In the **Select Contact** dialog box click on the name and then click **Select** and **OK**.
  - The notification will be send on the selected resource as an email, when you save and close the project.
  - The email notification set by default. The message contains the following planning data:
    - Project **name** and **number** (in the subject)
    - The name of the activity

- Description
- Personal duration.
- Location
- WBS code
- Flag
- Group

NOTES

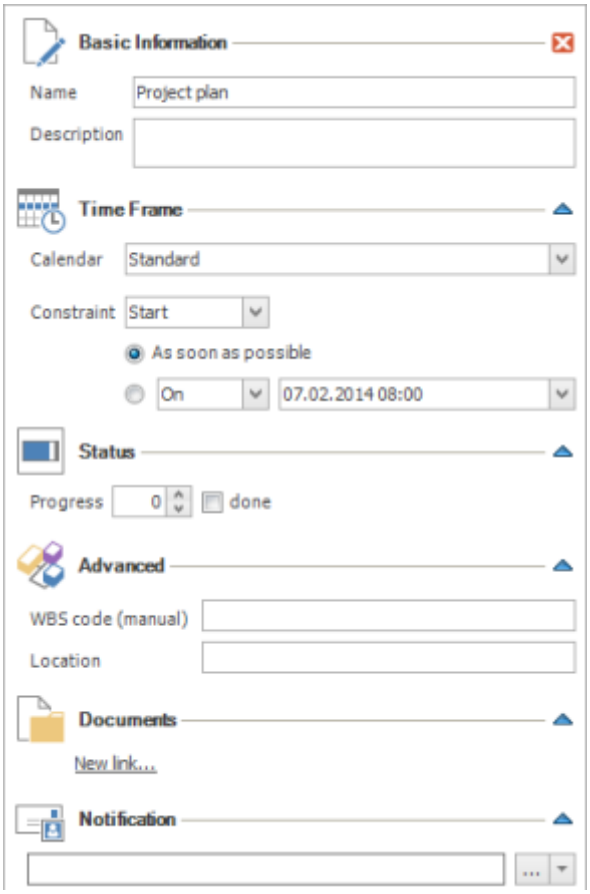
- Add Outlook tasks and appointments to the InLoox PM Planning via Drag and Drop. The duration of this new activity is an actual effort drawn from the Outlook task or the duration of the Outlook appointment.
- Select the last planning item in the planning and click ↓ on your keyboard to create a new planning item.

Create and edit a milestone

By defining milestones, you can specify when and how important project results have to be achieved. Please follow these steps to define milestones in InLoox PM:

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Create a planning by adding milestons. In the **Planning** page, in the **Edit** group, click **New Milestone**.

   NOTE Create your planning faster by adding new activities by using the **Copy** and **Paste** feature in the **Edit** group.
4. In the side panel, on the **Edit** tab, you can adjust the milestone to your requirements:



- General information on the milestone in the Basic information area

    1. In the **Name** box, type a name.
    2. In the **Description** field enter some important information on the milestone, e.g. the targeted deliverables or internal remarks.

        TIP InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.

- Time conditions to the milestone in the Time frame area

    5 Define its time and dependencies regarding other planning elements.
    The current date will be set by default in the new project.

    1. Select **Standard** as a calendar or choose a user-defined working time calendar from the list in the **Calendar** box.
    2. In the **Constraint** box, define the constraints of the activity. Choose between **Start** or **End**.

3. The constraint **As soon as possible** is set up as default value for the **Start** and **As late as possible** for the **End**. InLoox PM will automatically display the calculated date in the **Time frame** section.
4. Choose below, if you want to set your own date and the constraints. In the drop-down list choose between **On**, **No earlier than**, **No later than**.

   TIP For more information about the dependency and constraints, see Create planning elements dependency.

- Processing status of the milestone in the Status area

  Define the progress or activate the **done** check box to display the processing status of the milestone.

- More information on the milestone on the Advanced area

  1. In the **Location** field, enter a location.
  2. In the **WBS code** box, enter a work breakdown structure code to identify activities and milestones in large projects. In this case you can define the subsumption.
  3. You can use the field with the automatic WBS code in the project list.

- Add a document to the milestone

  1. Click **New link...** to add the document.
  2. In the **Select Entry** dialog box select one document from the list and click OK.
  3. The added document ist displayed in the **Document** area on the side panel. Click it to open this document. Click **Delete** symbol to remove it.

- Sending a notification to a resource

  IMPORTANT All added resources receive automaticallly notifications about new, edit or deleted milestone.

  In the area Notifications, you can inform other resources,e.g. project planner, about milestones and about the changes in them.

  - Click the command ... to add resources.
  - In the **Select Conact** dialog box click on the name and then click **Select** and **OK**.
  - The notification will be send on the selected resource as an email, when sie save and close the project.

  The email notification set by default. The message contains the following planning data:

- Project **name** and **number** (in the subject)
- The name of the milestone
- Description
- Start or end date of the milestone
- Location
- WBS code
- Flag
- Group.

Create and edit a summary activity

You can organize and structure the existing planning by using summary activities. A summary activity summarizes several related single activities to a superordinated activity. This leads to a clearly structured project plan.

Article content

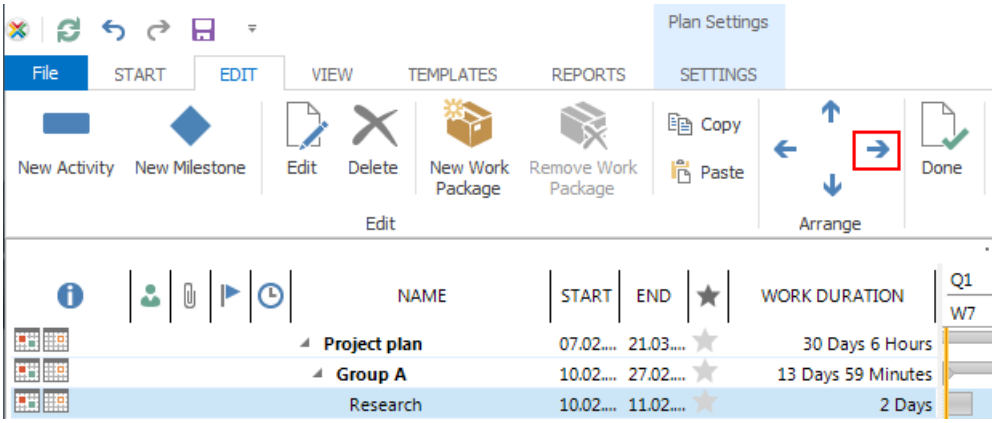
Create a summary activity

Edit a summary activity

Create a summary activity

To create a summary activity proceed as follows.

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Select the activities and milestones that you want to subordinate and click **Group** ➔ in the **Grouping** group. InLoox PM changes the activity above to a summary activity.



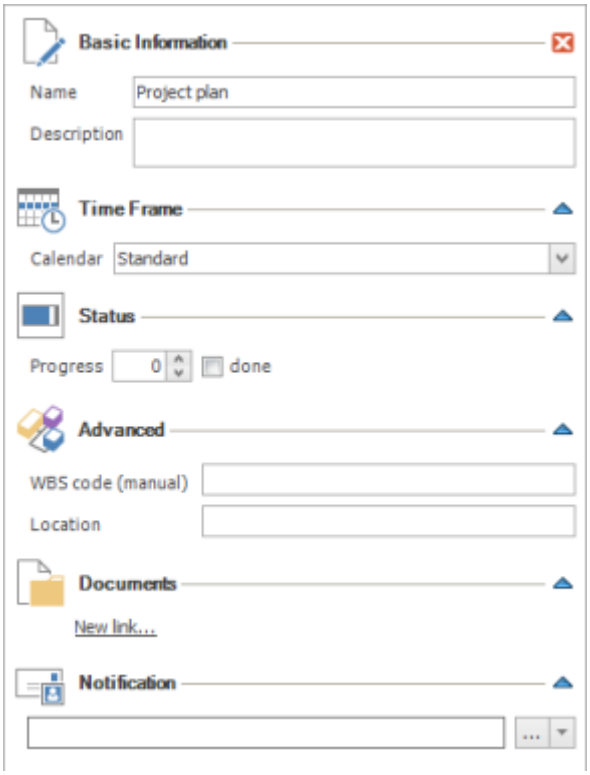
NOTES

- The activity which is to be changed to a grouping must not contain any **links** or **dependencies**.
- The **time period** for the grouping is automatically adjusted to take account of items at lower levels.

Edit a summary activity

To edit a summary activity proceed as follows:

1. Right-click on the selected activity and click **Edit** in the context menu. For more information on how to create a project see Create a project.
2. In the side panel, on the **Edit** tab, you can adjust the summary activity to your requirements:



- General information on the summary activity in the Basic information area

    1. In the **Name** box, type a name.
    2. In the **Description** field enter some important information on the summary activity, e.g. the targeted deliverables or internal remarks.

    TIP InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.

- Defining work calendar to the summary activity in the Time frame area

    1. Select **Standard** as a calendar or choose a user-defined working time calendar from the list in the **Calendar** box.

- Processing status of the summary activity in the Status area

    Define the progress or activate the **done** check box to display the processing status of the summary activity.

- More information on the summary activity on the Advanced area

    1. In the **Location** field, enter a location.
    2. In the **WBS code** box, enter a work breakdown structure code to identify activities and milestones in large projects. In this case you can define the subsumption.
    3. You can use the field with the automatic WBS code in the project list.

- Add a document to the summary activity

    1. Click **New link...** to add the document.
    2. In the **Select Entry** dialog box select one document from the list and click OK.

    TIP All displayed documents in the dialog box are saved on the Documents page. For more information on how to add the document to the project, see Create and edit a document.

    3. The added document ist displayed in the **Document** area on the side panel. Click it to open this document. Click **Delete** symbol to remove it.

- Sending a notification to a resource

IMPORTANT All added resources receive automaticallly notifications about new, edit or deleted summary activity.

In the area **Notifications**, you can inform other resources,e.g. project planner, about a summary activity and about the changes in them.

- Click the command ... to add resources.
- In the Select Conact dialog box click on the name and then click Select and OK.
- The notification will be send on the selected resource as an email, when sie save and close the project.

The email notification set by default. The message contains the following planning data:

- The name of the summary activity
- Project name and number (in the subject)
- Description
- Duration.

Work with the work packages in the planning

How to assign a work package to planning elements with InLoox PM?

1. Open an existing project or create a new one.
2. In the project, go to the **Section** group on the **Start** tab and click on **Planning**.
3. First, create a planning by adding an activity or a milestone.
4. You can add a work package to a planning element as follows:

- Create a new work package Go to the Edit group on the Edit tab and click on New Work Package.
- Go to the side panel of the Edit tab to add important, work package specific information.

TIPS

1. Find quickly the certain work packages via search feature. Enter the name in the Search work packages....
2. Afte you have added a work package to the planning, its work load will be displayed in the Gantt chart.
3. For more information on how to assign a work package to resources, see Add resources.

4. You can also define the budget for the work package on the **Work Package** page.
5. For more information on how to add further work package related information, see Create and edit a work package.

- **Add an existing work package** To display existing work packages, go to the side panel of the **Work Packages** tab and click on the **Not Assigned Work Packages** area.

1. Draw one work package and add it via Drag&Drop to a planning element. If you want to add it to the existing one, mark this planning element befor. If you want to add a work package as a planning element, just draw it to the planning list. Work package related information like name, resources with capacity, etc. are displayed in the planning view.

5. You can delete a work package from the project plan by clicking **Remove Work Package**, in the **Edit** group, on the **Edit** tab.

Create dependencies between planning elements

A dependency represents a relationship between two planning elements, where one element with its start or end is dependent on the start or end of the other one. A planning element is a successor, if it is dependent on the other element. A planning element is a predecessor, if the other planning element depends on it. These two types are displayed on the project plan (Gantt chart). The dependency describes a consequence and chronological order between two elements in this chart.

Article content

Types of dependencies

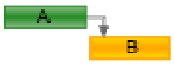
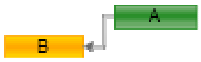
Constraints

Lags

Types of dependencies

In InLoox PM, you can use the duration of planning elements, different types of dependencies, constraints and positive and negative lags. You can modify the information in the planning by using the features in the Ribbon, New / Edit dialog box and in the Gantt chart. InLoox PM automatically adjusts the schedule and displays information about the relationships between planning elements.

The type of dependency between activities defines how the activities are linked to each other. InLoox PM provides you with the following dependency types:

Dependency	Example	Description
End-to-Start		The activity B begins after the activity A is finished. E.g. the activity A is "Prepare a presentation" and the activity B is "Hold a presentation". In this case the "Hold a presentation" activity cannot begin until the "Prepare a presentation" activity is completed.
Start-to-Start		The dependent activity B cannot begin until the activity A that it depends on is completed. For example, the activity A is "Prepare texts for the web site" and the activity B is "Add screenshots". However, the "Add screenshots" activity begins, when the "Prepare texts for the web site" activity begins.
End-to-End		The activity B cannot be completed until the activity A that it depends on is completed. E.g. the activity A is "Write texts" and the activity B is "Check texts". The "Check texts" activity cannot be completed until the "Write texts" activity is finished.
Start-to-End		The activity B cannot be completed until the activity A that it depends on begins. This type is also called jump sequence. The jump sequence chain forms the latest possible project start. E.g. the activity A is "Print a brochure" and the activity B is "Send for printing". The "Send for printing" activity must be finished before "Print a brochure" begins.

Edit a dependency in the Gantt chart

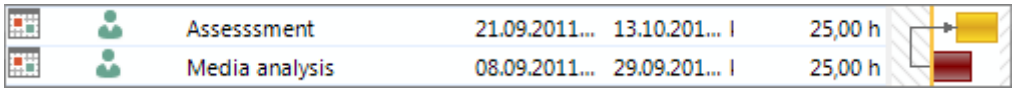
This is how you can generate and edit dependencies:

1. Double-click on the link line in the Gantt chart
2. The **Edit Dependency** dialog box is displayed. In the Type field select the direction of the dependency.
3. In the **Lag** field define the **days** and **hours** of the lag between two planning elements.

4. Activate the **Negative** control box for the negative lag. The description of it you will find down in the Lags area.

Lags

InLoox PM provides you with the possibility to determine the lags between two linked planning elements. By using lags, you can define the time interval between two planning elements. You can create a positive or a negative lag.



Positive lag The issue date (start or end) of the successor is **after** the predecessor. A positive lag means "waiting". E.g. you want to set a lag between two activities "Draw a picture" and "Frame a picture", because the paint needs to dry. Create a positive lag by putting in e.g. 2 days. The time lag of 2 days is always constant, even if the predecessor will take 4 days more.

Negative lag If an activity is supposed to start before its predecessor ends, it is necessary to define a negative lag (both activities overlap). A negative lag means "to bring forward". Example: You want to prepare a marketing brochure. Two activities are supposed to overlap so that the activity "Illustrate" starts 3 days before the activity "Write texts" is completed.

NOTE See the upper section Edit dependencies in the Gantt chart in ordder to know how you can edit lags.

Constraints

Use constraints for each activity in order to control the start and end date. InLoox PM provides you with the constraint types you see in the list below. For new planning elements, the constraint **As soon as possible** is set up as default value for the forward scheduling and **As late as possible** for the backward scheduling.

You can combine the different constraint types with the different types of dependencies.

Constraint type	Description
As soon as possible	An activity begins as early as possible. This activity is calculated from the start date.

Constraint type	Description
As late as possible	An activity begins as late as possible. This activity is calculated from the end date.
End no later than	An activity will be finished on or before a specified date. Use this constraint to ensure that an activity does not finish after a certain date.
Start no later than	An activity starts on or before a specified date. Use this constraint to ensure that an activity does not start after a certain date.
End no earlier than	An activity will be finished on or after a specified date. Use this constraint to ensure that an activity does not finish before a certain date.
Start no earlier than	An activity starts on or after a specified date. Use this constraint to ensure that an activity does not start before a certain date.
Start on	An activity starts on a specified date. Sets the early and the late start date to the date that you choose and anchors the activity in the schedule.
End on	An activity will be finished on a specified date. Sets the early and the late end date to the date that you choose and anchors the activity in the schedule.

Backward scheduling

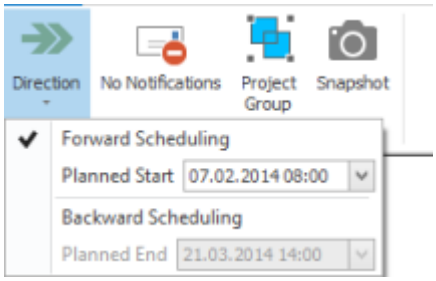
Backward scheduling is a technique to calculate the project plan from the due date. You can assign the work packages in a way that the entire project will be finished exactly to the due date.

In the backward scheduling, a new planning element starts as late as possible. This planning element, which is the last one in the planning chain, stays at the end of the project plan. The idea of the backward scheduling is to determine the latest possible end date of this planning element to meet the planned due date. The latest end and start date of each planning element in the project plan is consequently calculated.

Therefore, the project plan is calculated until the latest possible date of the planning start by considering any necessary lags between planning elements. The slacks, critical planning elements as well as the critical path can be determined due to this calculation.

TIP For more information on the critical path and slacks, see Show the critical path.

Do the following to create a backward scheduling:



1. On the **Settings** tab, in the **Settings** group, click **Direction**.
2. Select **Backward Scheduling** from the drop-down list.
3. Enter an end date for the planning. Choose the date in the **Planned End** box.
   InLoox PM calculates the project plan from the end date until the start date.
4. Create the first planning element by clicking **New Activity** or **New Milestone** in the **Edit** group, on the **Edit** tab.
5. This first element is the last one in the project plan and has no successor.
6. Determine the latest completion date of each predecessor in the planning.

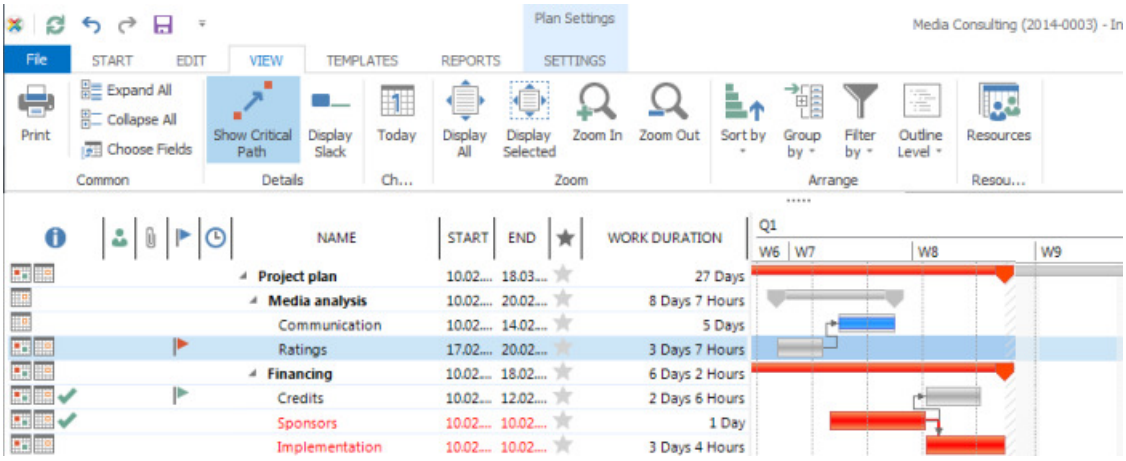
   TIP For more information on how to create planning elements, see Create planning elements.

Show the critical path

The critical path marks activities and milestones, which in case of delay immediately lead to the exceeding of the planned project end.

You can display the critical path only in an already existing planning.

1. Open an existing project or create a new one.
2. In the project, on the **Management** page, in the **Section** group, click **Planning**.
3. On the **View** tab, in the **Details** group, click **Show Critical Path**.



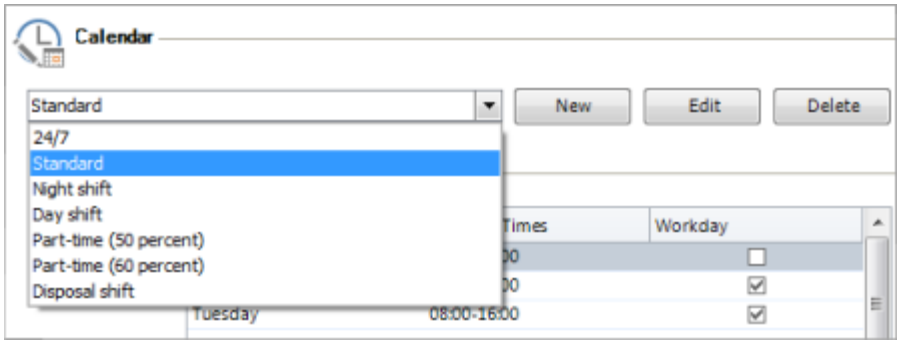
NOTES

- The critical path is displayed in red and all other markings will be hidden.
- You can see for how many days you can move planning elements until they become critical. On the **View** tab, in the **Details** group, click **Display Slack**.
- In the project plan, in the **Is critical** column all planning elements belonging to the critical path are marked with "critical".

Set a work time calendar

InLoox PM adapts to the working times of your company. In the InLoox PM options you can set individual working time models to display for example part-time work, shift work or weekend work.

1. Open the dialog box **InLoox PM Options**.
2. Under **Planning** click **Working times**. On the right side, you see the **Working times** area.



3. In each area you can choose the following options:

1. Calendar

    - **Add a new calendar** On the **Calendar** area, click **New**. On the **New Calendar** dialog box, in the field **Name** enter a new name and click **OK**.
      Now, the new calendar is displayed in the drop-down list in the **Calendar** area. You can add to the calendar **Working times**, **Working days** and **Days off**.
    - **Edit a calendar** Select a calendar from the drop-down list in the **Calendar** area and click **Edit**. On the **Edit Calendar** dialog box, in the **Name** field, change a name and click **OK**.
    - **Remove a calendar** Select a calendar from the drop-down list in the **Calendar** area and click **Delete**.

3. Working times

    1. Select one day from the list and Click **Edit**.
    2. In the dialog box **Edit Working Day**do the following:

        - Select tthe **No workday** option for a day off.
        - Select the **Workday**option for a work day.

            1. Select the **24 hours** option for the permanent operation.
            2. Select the **Working times**option to define them.

                1. Click **Add** and enter **Start** and **End** in the **New Working Time** dialog box. Click **OK**.
                2. To edit already existing working times, select an entry from the list and click **Edit**.
                3. To delete existing working times permanently, select an entry from the list and click **Remove**.

        - Click **OK**.

4. Days off

    In this area, you can add or import new days off and edit or delete the existing ones.

    TIP For more information see Set days off.

5. Working day

Define the number of hours of a working day in the **One working day contains...hour(s)** box. This parameter helps the user to enter time periods for activities and workloads for work packages.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

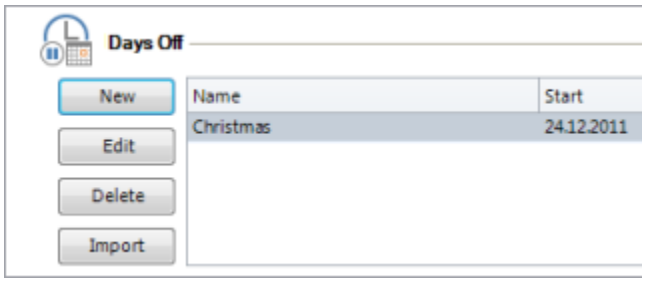
NOTES

- If the **working times** are changed or **working days** are activated or deactivated, the internal costs of a project are only then changed when the relevant element is opened and the project saved.
- The billing of internal costs on the planning page only takes account of the number of working hours of work packages in planning activities.
- The values specified here define the standard start and end for new planning elements. The use of working times facilitates the input of **activities** and **milestones.**

Set days off

In the InLoox PM options, you can set days off and import Microsoft Office Outlook holidays files (*.hol).

1. Open the **InLoox PM Options** dialog box.
2. Below **Planning**, click **Working times**. On the right side you see the **Days off** area.



3. Do one of the following:

   - Set a new day off

     1. In the **Calendar** area, choose a calendar from the drop-down list.

6 In the **Days off** area, click **New.**

7 Type a name in the **Name** field, in the **New Non Working Time** dialog box.

8 Select a date in the **Start** field.

9 You can optionally choose the **End** to define the end or to add several days off.

10 Select the **Full-time** option, if you want to define the whole day as a day off.

11 Select the **Available in all calendars** check box, if you want to apply this day off for all calendars.

12 Click **OK**.

NOTE Define the days off per calendar, e.g. to define different holidays in different calendars (such as country-specific holidays).

- **Edit items** Choose one day off from the list and click **Edit** to edit it.
- **Delete items** Choose one day off from the list and click **Delete** to remove it permanently.
- **Import items** Choose one day off from the list and click **Import**.
  InLoox PM loads a **Microsoft Office Outlook holidays file** (*.hol).

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Planning templates

Topics

Import a planning template

Save a planning template

Manage planning templates

Import a planning template

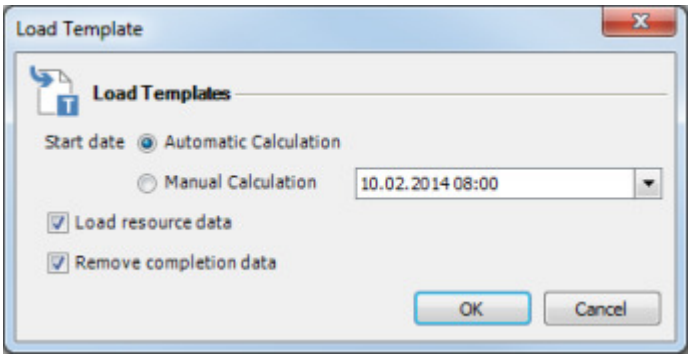
Use already existing Microsoft Project files for a new project planning. A planning template includes milestones, activities and summary activities.

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. On the **Planning** page, on the **Templates** tab, in the **Action** group, click **Import Templates**.
4. In the drop-down list choose one of the following file formats:

- MS Project File
- MS Project Exchange File
- XML File
- InLoox PM Planning File

You can load a template from your local data in these formats.

5. You can also select the saved templates in the **InLoox PM Templates** group in the gallery view.
6. If you have chosen an already saved template, the **Load Template** dialog box will be displayed:



1. Choose between **Automatic** and **Manual Calculation** to define the working times of the related work packages.

   - **Automatic calculation** when using automatic calculation, all existing constraints will be replaced by a “Start as soon as possible” constraint. The activities and milestones are allocated in accordance with the planned start date from the planning settings (under “Direction”), independently of the project start date on the management page.
     If backwards planning is being use, all existing constraints will be replaced by a “Finish as late as possible” constraint. The activities and milestones are allocated in accordance with the planning end date from the planning settings (under “Direction”), independently of the project end date on the management page.
   - **Manual calculation** manual calculation takes the start date as the basis for the first element in the planning. All subsequent elements will reflect the structure of the template. In order to do this, all constraints in activities and milestones will be removed and replaced with a “Start On” constraint. The automatic planning functions are not used.

6. Define the **Start date** as well as **Work times** for the planning elements if you have chosen the manual calculation.

7. Select the **Load resource data** check box to load the resource information of a planning.
8. Deactivate the **Remove completion data** check box, if you don't want to see progress information and resources in your planning.
9. Click **OK**.

NOTES

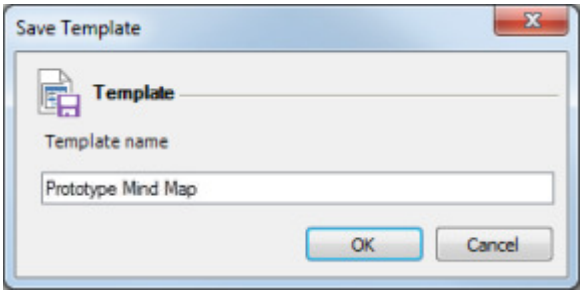
- The start date determines the date for the first (earliest) activity or milestone from the selected template. InLoox PM places the other items according to this time.
- You can load more than one template to the same planning. The multiple loading of the same template is also possible.
- The following templates such can also be loaded:
  - Microsoft Project (MPP)
  - Microsoft Project XML (XML)
  - Microsoft Project Exchange (MPX)

Save a planning template

You can easily exchange project schedules between InLoox PM and Microsoft Project. InLoox PM users do not need any additional software - neither is Microsoft Project necessary.

And this is how you do it:

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. On the **Planning** page, on the **Template** tab, in the **Action** group, click **Export Template**.
4. In the drop-down list you can choose between the following formats:
   - InLoox PM planning file...
   - XML file...
   - Picture
5. If you choose the **Save Template** command, in the **InLoox PM Templates** group, the **Save Template** dialog box will be displayed.



6. In the **Template name** field, type a name.
7. Click **OK**.

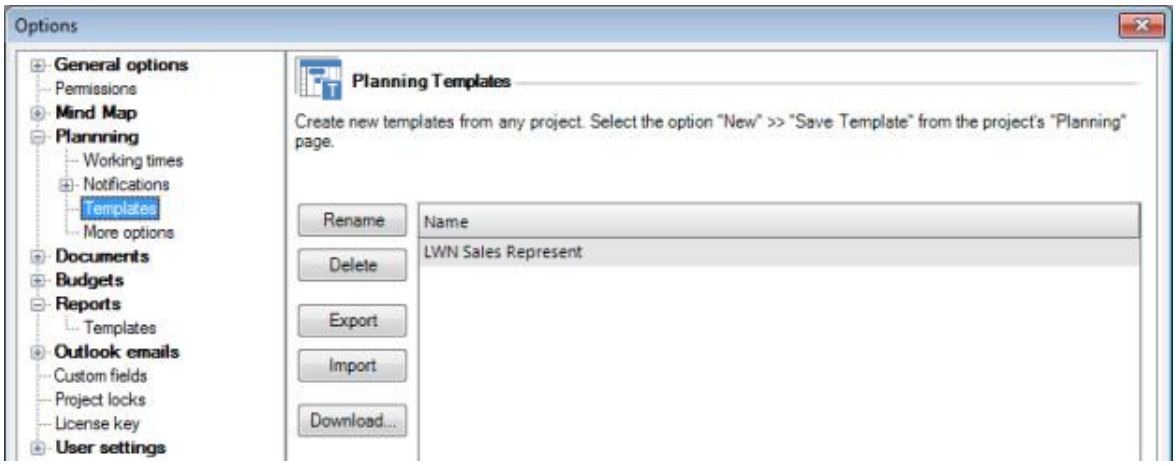
   The template is saved in InLoox PM. InLoox PM saves not only planning elements, but also all resources and their notification options.

Manage planning templates

In the InLoox PM options, you can edit planning templates that you have already saved.

IMPORTANT To manage templates it is necessary to have InLoox PM administrator permissions.

1. Open the **InLoox PM Options** dialog box.
2. Below **Planning**, click **Templates**. On the right side you will see the **Planning Templates** area.



3. Do one of the following:

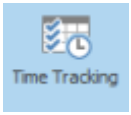
   - Change the name of the saved template. Choose one template from the list and click **Rename**. In the **Rename Planning Template** dialog box, in the **New Name** field type a new name for this template and click **OK**.
   - Remove permanently one template from InLoox PM. Choose one template from the list and click **Delete**.

- Save a template in your local documents. Choose one template from the list and click **Export**.
- Load a template from your local data. Click **Import** and choose a template in the **Load Planning Template** dialog box, then click **Open**.
- Click **Download** to download a planning template from the InLoox website.

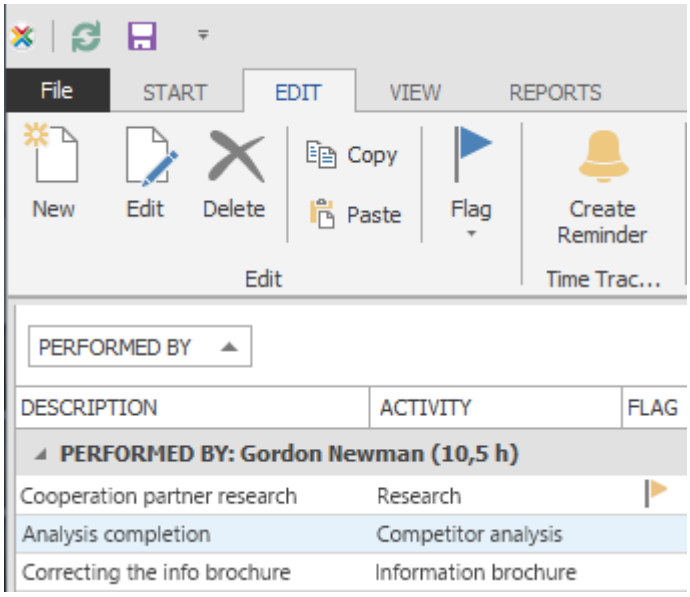
4. Click **OK** or **Apply** to save the changes in InLoox PM.

Time tracking

Work with the time tracking

In the project, in the **Start** tab, in the **Section** group, click **Time Tracking** 

to open the **Time Tracking** page. On this page you find the following features:



Features on the Edit tab

- Add a new time tracking entry On the Edit tab, in the Edit group, click New.

- Edit a time tracking entry On the Edit tab, in the Edit group, click Edit to add further information to the selected item.
- Remove a time tracking entry On the Edit tab, in the Edit group, click Delete to remove the selected entry from the time tracking list.

  NOTE Use multiselection to edit several time tracking entries simultaneously. Click therefore on the first entry that you want to edit. Then, keep the CTRL key on your keyboard pressed and select the other entries that you want to edit. Then right-click to open the context menu and click the command that you want to execute.
- Copy and paste Create quickly time tracking entries by using the Copy and Paste feature in the Common group. These features can be found on the Edit tab in the Edit group.
- Highlight a time tracking entry Select one entry from the list and click Flag in the Edit group, on the Edit tab. Choose one color from the drop-down list.
  Now you can see the selected flag next to the entry in the list.
- Create a reminder On the Edit tab, in the Time Tracking group, click Create Reminder to create a reminder in your Outlook calendar.

Features on the View tab

- **Print a time tracking view** On the **View** tab, in the **Common** group, click **Print** to start the quick print feature of the time tracking list.
- **Expand or reduce the time tracking view** Change the view by using the **Expand All** or **Collapse All** buttons in the **Common** group on the **View** tab to have a clearly structured time tracking view.
- **Choose Fields** This feature sorts and organizes the project by selected data. This feature can be found in the **Common** group, on the **View** tab.
- On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column header.
- Reset the fields via Drag and Drop into the dialog box.
- **Filter the time tracking entries** Use the **Filter** feature, in the **Common** group, to quickly find the needed document.

Features on the Reports tab

- **Create a report** On the **Reports** tab, you can create a report.

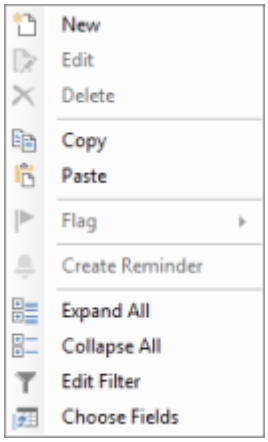
- In the **Create** group, click **New Report**. In the **New Report** dialog box, on the **Report** tab, choose a template from the **Use this template** drop-down list. Filter the data in the **Time tracking** tab and click **Create**.
- In the **Reports** group select a saved report from the gallery view, e.g. **Time tracking**.

Information rules in the time tracking list

- A time tracking item can be marked with one of these flags .
- A **paper clip** shows that one or more documents are linked to the time tracking item. Click on the **Paper clip** and then on the button to open a list of the linked documents.
- The **total duration** of all items is displayed above the time tracking list.
- The list is sorted by **date** in descending sequence and can be grouped and sorted just like an Outlook list.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the Time Tracking page, such as New, Edit, Delete, Copy and Paste or Create Reminder. It has also features such as Expand and Collapse All Groups, Choose Fields and Edit Filter. Right-click in the time tracking list to open the context menu.



Keyboard shortcut

- **CTRG+C** Copy a time tracking entry into the clipboard.
- **CTRG+V** Paste a time tracking entry from the clipboard to the time tracking list.

NOTE If the lock icon is displayed in the list, you don't have read permissions. In this case, no time tracking entry will be displayed.

Create and edit a time tracking entry

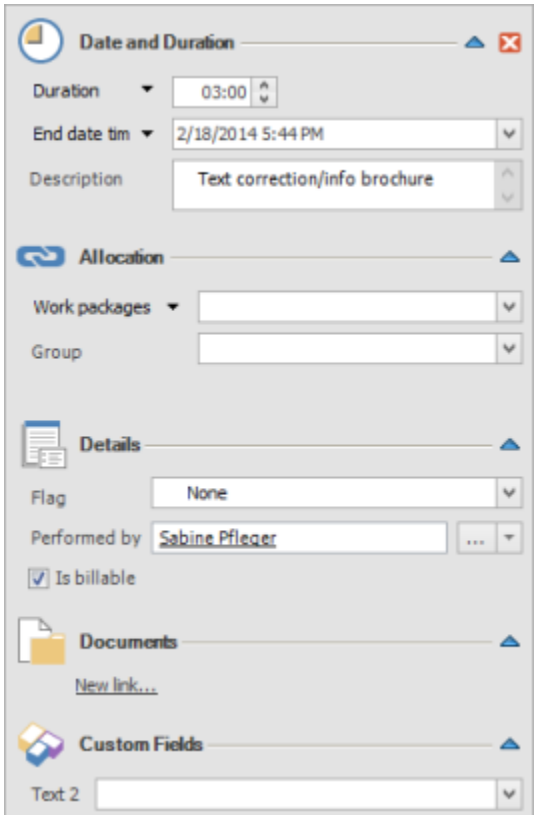
Read here how to post costs and working hours in InLoox PM. The system assigns the effort to the project plan automatically and stores a separate cost record.

If you want to record your personal actual hours, proceed as follows:

1. Open an existing project with an existing planning.

   TIP For more information on how to create a planning, see Create planning elements.

2. In the project, on the **Start** tab, in the **Section** group, click **Time Tracking**.
3. On the **Time Tracking** page, in the **Common** group, click **New.**
4. On the side panelselect one of following options:



- General information on the time tracking entry on the Date and Duration area

- In the Date and Duration area select the Start and End date time.

  NOTE Choose between Duration and End date time by clicking on one of them in the Date and Duration area and choose the other opportunity in the drop-down list.

- In the Description field enter a text, e.g. the location of the service, the team member name, the meeting results or internal remarks.

  TIP InLoox PM provides you with different formatting features for the Description field text. For more information about these features see Create and change comments, in the Customize a comment section.

- Assignment to work packages or planning elements on the Allocation area

  - Define wwhether you want ot assign to a work package or to a planning element.

    1. Click **Work package** button and select **Work** packages or **Activities**from the drop-down list.

       - For the **Work packages** option select one work package between assigned or not in the next field to the button.
       - For the **Activity** option select the certain element by the name from the planning list in the next to field the button.

  - Select a group in the **Group** filed to which this entry belongs.

- More information on the time tracking entry on the Details area

  - Choose from the **Flag** drop-down list a color to mark the item in the time tracking overview.
  - In the **Performed by** box choose a name of the person, who carried out the item.

    Click beside **Performed by** and choose a name from the **Select contact** dialog box.

    NOTES

    - InLoox PM saves automatically the name of the person, who created the item or last edited it.

- Use the **quick selection** to add a new resource. Click the **Arrow** to see all resources in the drop-down list all resources, which have been added to the project.

- Select the **Is billable** control box to bill this item on the **Budget** page. The items with this status are included in the actual revenues of the project budget.

- Adding documents

1. Click New link... to add the document.
2. In the Select Entry dialog box select one document from the list and click OK.

> TIP All displayed documents in the dialog box are saved on the Documents page. For more information on how to add the document to the project, see Create and edit a document.

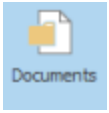
3. The added document is displayed in the Document area on the side panel. Click it to open this document. Click Delete symbol to remove it.

- Further information on the time tracking entry on the Custom tab

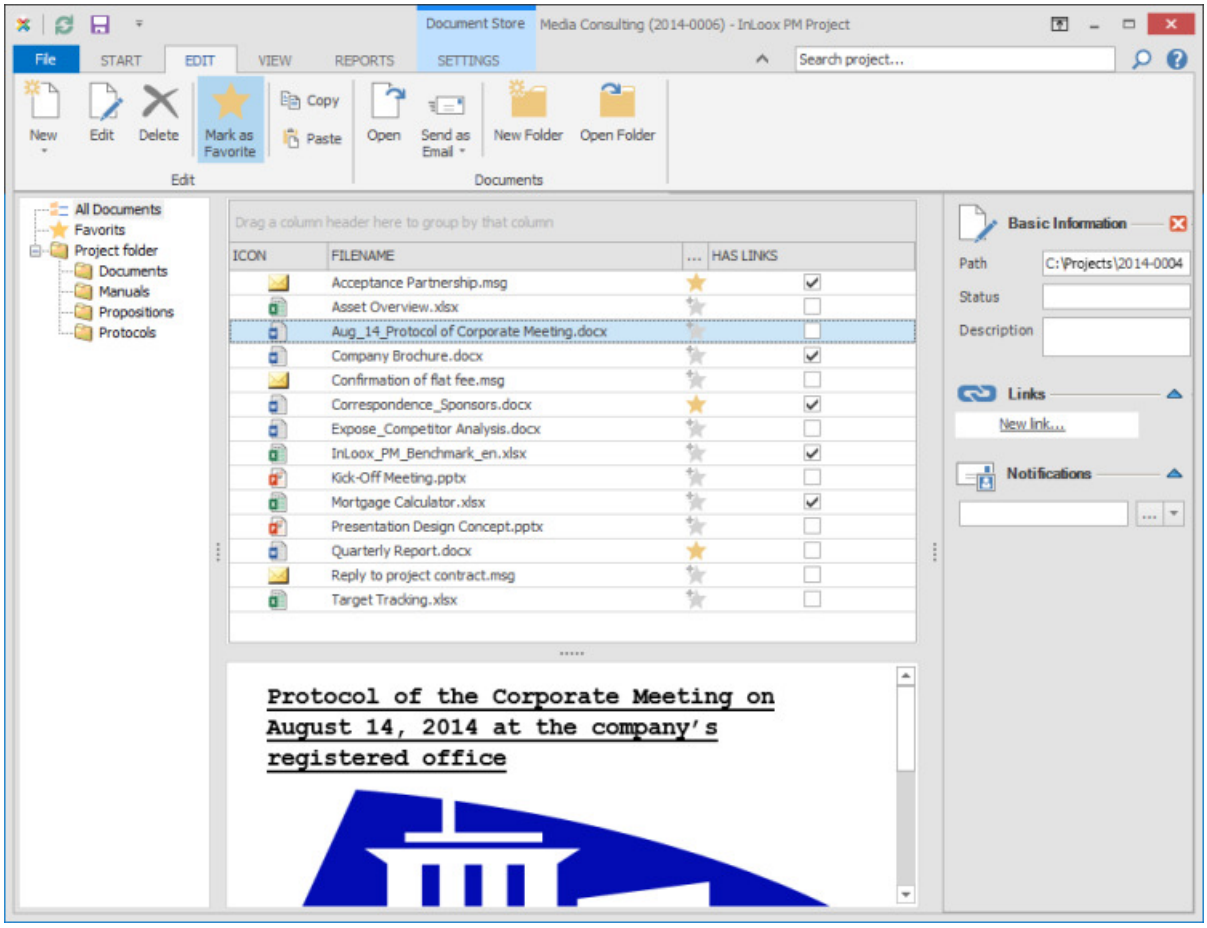
  - Click in the previously created custom field and enter a new value.

Documents

Work with the document list

In the project, in the **Start** tab, in the **Section** group, click **Documents** 

to open the **Document** page. On this page, in the **Edit** tab you will find the following features:



Features on the Edit tab

- **Add new document** On the **Edit** tab, in the **Edit** group click **New**.
- **Edit a document** On the **Edit** tab, in the **Edit** group click **Edit** to change the document.
- **Remove a document** On the **Edit** tab in the **Edit** group click **Delete** to remove the selected document from the document list on the right side.
- **Add a document to the favorite folder** On the **Edit** tab, in the **Edit** group click **Mark as favorite**. On the left, in the document view, click Favorite to see the marked document.

  IMPORTANT The created favorite view is not visible for other users.
- **Copy and paste** Create quickly documents with the help of **Copy** and **Paste** feature on the **Edit** tab in the **Edit** group.
- **Open a document** Choose one document from the document list on the right side. On the **Edit** tab in the **Edit** group click **Open**.

  WARNING You need the administrator permission to open the document.

- **Send a document via email** On the **Edit** tab, in the **Documents** group click **Send As Mail**. In the drop-down list select **Send Link(s)**, if you want to send only document path, or **Send Document(s)** to send the document as an attachment.
- **Create a new subfolder** Choose a folder from the document folder tree view on the left side. On the **Edit** tab, in the **Documents** group click **New Folder**. In the**Create New Folder** dialog box type a new name and click **OK**. InLoox PM creates automatically a new subfolder in the document folder view.
- **Open a document folder** On the **Edit** tab, in the **Documents** group click **Open Folder** to open the document folder in Windows Explorer or the web browser (in the case of a **SharePoint** document library).

Features on the View tab

- **Print a document list** On the **View** tab, in the **Common** group click **Print** to start the quick print feature of the document list on the right side.
- **Expand or reduce the document folder view** Change the view with the help of **Expand All** or **Collapse All o**n the **View** tab, in the **Common** group, to make clear the document folder view.
- **Choose Fields** This feature sorts and organizes the project by important data. On the **View** tab, in the **Common** group click **Choose Fields**.
  - On the **Choose Fields** dialog box click one field, e.g. **Outlook sender**, and drag it into the column headers.
  - Reset the fields per Drag and Drop into the dialog box.
- **Filter the documents** Use the **Filter** feature, in the **Common** group, to quickly find the needed document.
- **Change the preview area** InLoox PM provides you with the preview area to view important information of each document without opening it.
  - On the **View** tab, in the **Common** group click **Preview Area**.
  - In the drop-down list click **Right** or **Bottom** to set the preview area where you want. Click **Off** to deactivate it.

Features on the Reports tab

- **Create a report** On the **Reports** tab you can create a report.

- In the **Create** group, click **Create Report**, in the **New Report** dialog box, in the **Report** tab choose a template from the **Use this template** drop-down list.
- In the **Reports** group select a saved report from the gallery view, e.g. **Meeting**.

TIP For more information on how to add new report template to the InLoox PM system, see Manage report templates.

Features on the Settings tab

- **Choose the document folder path** On the **Edit** tab, in the **Documents** group click **Folder** .
- **Delete the document folder path** On the **Edit** tab, in the **Documents** group click . InLoox PM selects the document folder anew according to the document folder rule as soon as a new document is added to the project.
- **Update Document List** Refreshes the document folder view and the document list by reading all entries of the file store or SharePoint system. This feature is available on the **Edit** tab, in the **Documents** group.
- **Clean Document Folder** Removes all orphaned entries of the document list. This feature is available on the **Edit** tab, in the **Documents** group.

Information rules in the document folder view

- The entry **All documents** displays all the documents of the project file store including all subfolders in the document list.
- The entry **Favorites** displays all documents marked via Ribbon as favorites.
- The entry **Project folder** displays all the documents of the project file store excluding subfolder content.
- The entry **Project folder** can contain subentries by the means of a tree structure, representing the physical structure of the file store or the SharePoint system.

Information rules in the document list

- An entry contains the following data: filename, size, type, state, note, created on, changed on, folder and path.
- If the element was added to the project using the button **Add to Project** the following is also included: Outlook sender, Outlook topic, Outlook received on.

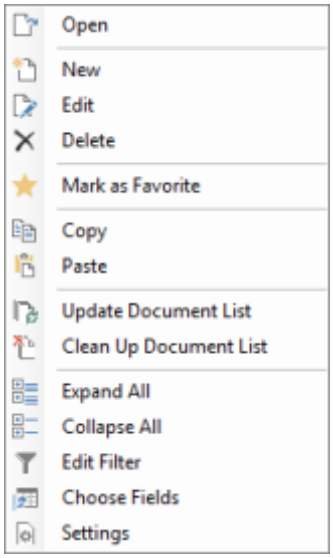
- If the project document folder is a **SharePoint** document library, the following is also included: SharePoint author, SharePoint operator, SharePoint document library, SharePoint site, SharePoint subfolder.

Information rules in the preview area

- Choose a document from the document list in order to see it in the preview area. The preview area allows you to see the whole document with several pages.
- Use **Copy** and **Paste** features in the document, on the preview area.

Features in the context menu

The context menu of the document list provides you with almost all basic features that are also available on the **Documents** page, on the Ribbon, such as **Open File**,**New**, **Edit**, **Delete**, **Mark as Favorite**, **Update Document List**, **Clean Up Document List**, **File Properties**, **Copy** and **Paste.** It has also such features as **Expand**and **Collapse All Groups**, **Choose Fields** and **Settings** from the document. Right-click in the document list to open the context menu.



Keyboard shortcut

- **CTRG+C** Copy a document into the clipboard.
- **CTRG+V** Paste a document from the clipboard to the document list.

NOTES

- Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project

- You have no read permissions, if the lock icon is displayed in the list. In this case no item will be displayed.

Create and change the document folder path

InLoox PM organizes your file or SharePoint Server. Every project offers access to related documents.

Article content

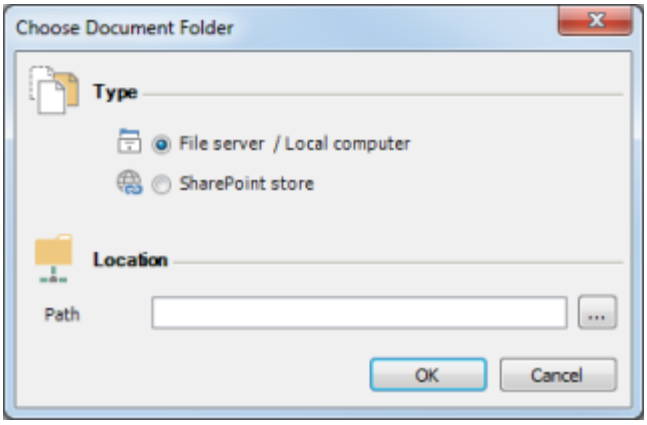
Change the document folder path

Create the document folder path

Create the document folder path

With a click of a button you can quickly link the saved documents in you folder to the project by adding or changing a document folder path. This feature is also very useful, if you want to link a lot of new documents. All you need is just update your document page.

1. Open an existing project or create a new one.
2. In the project, on the **Start** tab, in the **Section** group, click **Documents**.
3. On the **Settings** tab, in the **Document Path** group, click **Folder** .
   The added document path is now displayed in the **Document Path** box.
   NOTE Click , in the **Document Path** group, to delete the document folder path.
4. In the **Choose Document Folder** dialog box do the following:



   1. In the Type area choose between File server / Local computer and SharePoint store.

2. In the Location area click ... .
   Choose the folder you want to be read in.

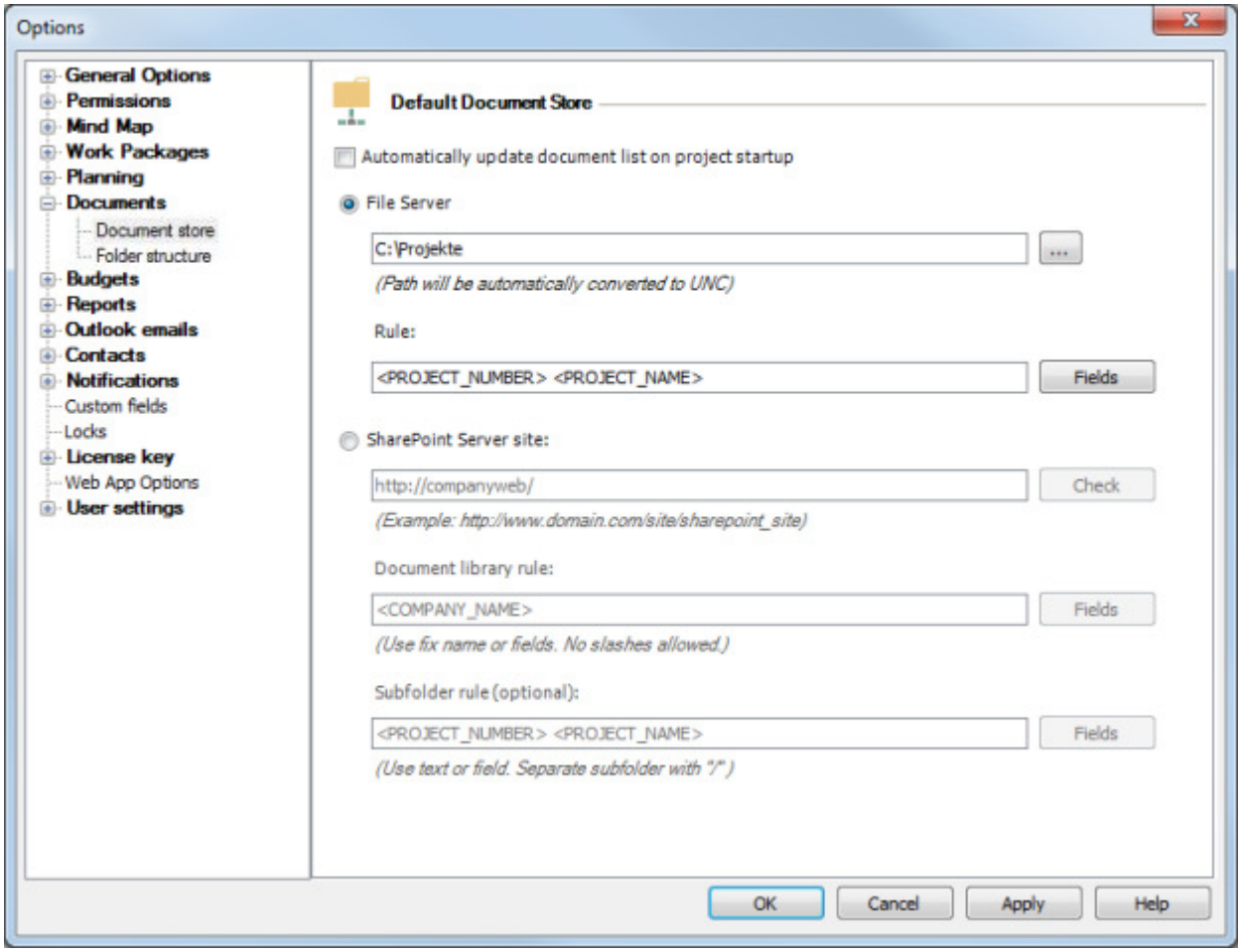
5. On the **Settings** tab, in the **Document folder** group, click **Update Document List**.
   The folder content will be read in the document section of the project. You can start to work with it right away.

Change the document folder path

The option page **documents** defines the rules for the InLoox PM file archiving feature. Some customizing options are available. The format of the project number affects the Document page. It is possible to update the contents of the project folder automatically.

1. Open the dialog box **InLoox PM Options**.

2. Under **Documents** click **Document store**. On the right side you will see the **Document store** area.



3. Do one of the following:

   - Select the **Automatically update document list on project startup** control box. Documents are read anew when the project is loaded. This option slows down the opening of a project but ensures automatically that the Documents page always shows current information.
   - Select **File Server** and click to add the folder you want.
   - Define the rule in the **Rule** field by adding one of the following fields from the **Field** drop-down list:
     - <PROJECT_NAME> (Project name)
     - <PROJECT_NUMBER> (Project number)
     - <COMPANY_NAME> (Customer name of the project)
     - <CURRENT_YEAR> (Current year, four digits)
     - <DIVISION> (Division name)
     - NOTE The **Standard parameter** <COMPANY_NAME>\<PROJECT_NUMBER> <PROJECT_NAME> points automatically to the following folder structure:
       <BASEPATH>\Customer1\2011-001 Project 1
       <BASEPATH>\Customer1\2011-002 Project 2
       <BASEPATH>\Customer2\2011-003 Project 1
   - Select SharePoint Server site:
     - **Base path**: Path to a SharePoint server site, e.g. http://companyweb/ or http://www.my-sharepoint.com/site_int/.
     - **Document library rule**: Structure for creating **SharePoint document libraries**. A fixed text may be input (which causes all projects to use the same library) or a rule (see file server rule, above). Creating a separate **SharePoint document library** for each project has the advantage that the data access permissions can also be defined separately.
     - **Subfolder rule (optional)**: Path name within a **SharePoint document library**. If no text is input the master folder of the document library is assumed. If only one **SharePoint document library** is to be used, it is useful to apply a rule (see File Server, above), since otherwise the documents from all projects would be copied to the same folder.

WARNING **Effects of changing storage type, base path or rules:**

- If no projects are yet on file, changing these parameters has no effect.

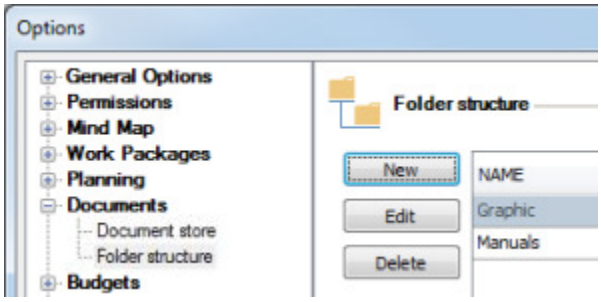
- New projects or projects for which no document folders exist are managed automatically according to the changed parameters.
- Existing projects are managed with the existing document folder until the user changes this manually

Create a subfolder

In the InLoox PM options you can define, which subfolder will be displayed on the Documents page by using file storage feature. InLoox PM allows subfolders to be created automatically in each document folder of a project.

TIP These subfolders are created new as soon as a user selects a new project folder on the Documents page. As many subfolders as required may be created automatically in a hierarchy structure of any depth. For more information see Create and change the document folder path.

1. Open the dialog box **InLoox PM Options**.
2. Under **Documents** click **Folder structure**. On the right side you will see the **Folder structure** area.



3. Do one of the following:
   - Insert a new subfolder by clicking **New**. In the **New Subfolder** dialog box type a new name, e.g. **Marketing**. Click **OK**.
     InLoox PM creates in each project document folder a subfolder named marketing.
   - Change the name of the existing subfolder. Choose one of them from the list and click **Edit**. Change the chosen item in the **Edit Subfolder** dialog box.
   - Remove a subfolder from InLoox PM by clicking **Delete**.
4. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of changing base path or rules:

- Existing subfolders are not deleted or renamed when the subfolder configuration is changed.
- In existing projects, new structures only become effective when new documents are added.

Create and edit a document

InLoox PM saves storage space and avoids duplicate records simultaneously. As the software works with file and object links, documents are not saved in Microsoft Outlook and Exchange Server.

InLoox PM saves storage space and avoids duplicate records simultaneously. As the software works with file and object links, documents are not saved in Microsoft Outlook and Exchange Server.

The InLoox PM document storage and management technology is based on intelligent links within Microsoft Outlook, Microsoft Windows and Microsoft SharePoint Server. The advantages of this method are:

- Virtually no additional storage space required, keeping InLoox PM projects lean.
- File rights are inherited. If for example you add a file from a protected network folder or SharePoint store to the InLoox PM storage, the file can still only be read and updated by authorized users - at no additional cost.
- Backup and existing version and document management applications can still be used.
- Open an existing project or create a new one.

1. In the project, on the **Start** tab, in the **Section** group, click **Documents**.

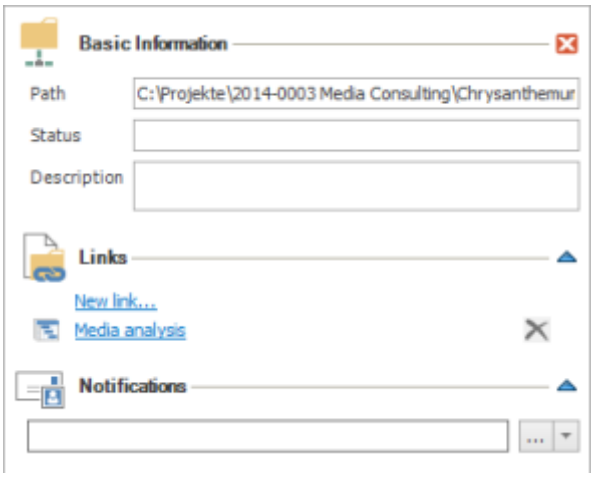
   TIP Choose first the document folder path in the new project to store the new documents. For more information see Create and change the document folder path.

2. On the **Edit** page, in the **Edit** group, click **New**.

   1. Click the arrow on the button to open the context menu. Select **File**, **Internet link** or **File link** to link to you local data.
   2. By choosing **File** click and choose a document you want from the **Open** dialog box. The document will then be displayed in the **Document** list on the **Documents** page.

3. Or click **Edit** to edit the document.

4. On the side paneldo the following:



- General information to the document on the Basic Information area

  1 In the Path box enter a path or an internet link.
  2 In the Status field enter instructions, e.g. complete or awaiting release.
  3 In the Notes field enter comments and remarks to the document.

  TIP InLoox PM provides you with the range of the formatting features. For the detailed description see Create and change comments in the Customize comments section.

- Links to other project items on the Links area

  1 Create links:
  2 Click New link....
  3 Choose between Planning, Time Tracking or Mind Map items and Work packages from the Assign Document Relation dialog box.
  4 Click Add and then OK.

  InLoox PM displays a document as a paper clip on the page you have chosen. You can also open the document on this page.
  5 You can open the chosen page. Click link on the **Links** area.
  6 If you want to delete the item , click **Delete symbol** .

- Sending a notification to a resource

  IMPORTANT All added resources receive automatically notifications about new, edit or deleted documents.
  In the area Notifications, you can inform other resources, e.g. project planner, about assigned work packages and about the changes in them.

- Click the command ... to add resources. In the **Select Contact** dialog box click on the name and then click **Select** and **OK**.
- The notification will be send on the selected resource as an email, when you save and close the project.
- The email notification set by default.

TIPS

- Add the document via Drag and Drop to the document list or to the other folder in the folder view left.
- You can also add the documents from Outlook to the InLoox PM planning via this function. For more information see Add Outlook elements to InLoox PM.

Cleaning the document list

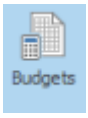
If data is removed from the document store and hence isn`t available for InLoox PM anymore, proceed as follows:

1. Open a project with the saved documents on the **Documents** page.
2. In the project, on the **Start** tab, in the **Section** group, click **Documents**.
3. From the **Folder structure** list choose the subfolder or **All Documents**.
4. On the **Settings** tab, in the **Document folder** group click **Clean Up Document List**.
   You can also use the context menu as an alternative. Choose from this menu **Clean Up Document List**. Right-click on one of the projects in the project list to open the context menu.
5. In the **InLoox PM** dialog box click **Yes**, to remove the entries from the **Clean Up Document List** area from the database.

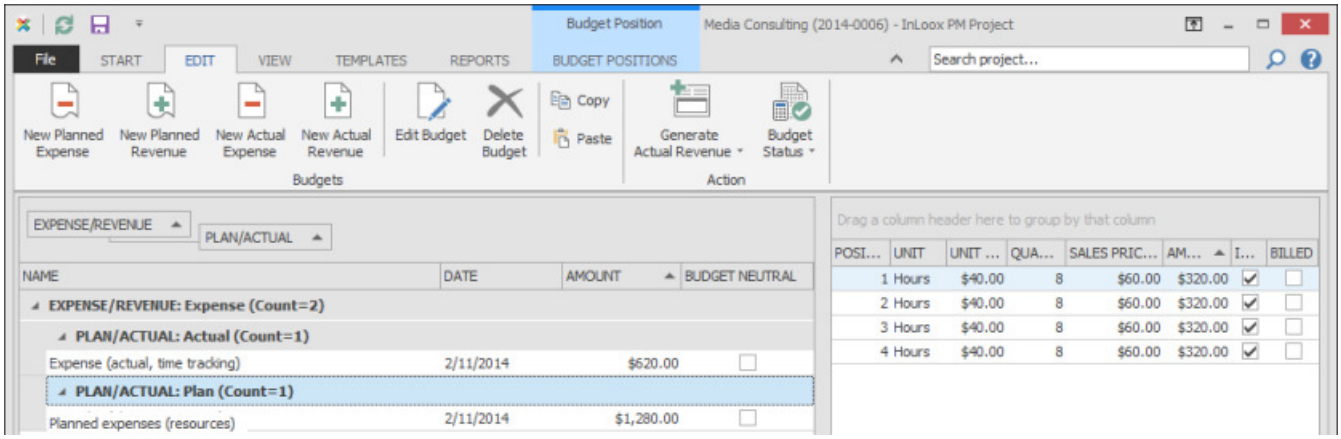
WARNING Information can be lost during cleaning.

Budgets

Work with the budget list

In the project, in the **Start** tab, in the **Section** group, click **Budgets** 

to open the **Budgets** page. On this page, in the **Edit** tab you will find the following features of the budget list:



- **Expense (actual, time tracking)** InLoox PM creates automatically an **Expense (actual, time tracking)**. The time tracking items in this budget are disposed according to the activities and groups, to which they belongs.

  NOTE The Editing of the expense (actual, time tracking) is limited.

- **Expenses (planned, resources)** InLoox PM creates automatically an **Expenses (planned, resources)** for the extisting planning with work packcages. The total work time of all work packcages is multiplied by the group purchasing price. All activity expenses are cumulated by group.

Features on the Edit tab

- **Create a planned expense** On the **Edit** tab, in the **Budget** group click **New Planned Expense** to record expenses. The resources will be used from the planning.
- **Create a planned revenue** On the **Edit** tab, in the **Budget** group click **New Planned Revenue**. A planned revenue serves a planning or proposal preparation.
- **Create an actual expense** On the **Edit** tab, in the **Budget** group click **New Actual Expense** to record actual expenses.

- **Create an actual revenue** On the **Edit** tab, in the **Budget** group click **New Actual Expense**. An actual expense can be also generated, e.g. with the expense positions from the time tracking. Normally an actual expense is a bill.
- **Edit a budget** Choose a budget from the budget list, which you want to edit. On the **Edit** tab, in the **Budget** group click **Edit Budget**.
- **Delete a budget** Choose a budget from the budget list, which you want to remove. On the **Edit** tab, in the **Budget** group click **Delete Budget**.
- **Copy and paste** Create quickly budgets with the help of **Copy** and **Paste** feature on the **Edit** tab, in the **Budget** group.
- **Change a budget status** Choose a budget from the budget list. On the **Edit** tab, in the **Budget** group click **Budget Status**. On the drop-down list click status you want to have.

Features on the View tab

- **Print a budget list** On the **View** tab, in the **Common** group click **Print** to start the quick print feature of the budget list. Choose **Budgets** in the drop-down list.
- **Expand or reduce the budget view** Change the view with the help of **Expand All** or **Collapse All** on the **View** tab, in the **Common** group to make clear the budget view.
- **Choose Fields** This feature sorts and organizes the project by important data.
  - On the **View** tab, in the **Common** group click **Choose Fields**. On the dialog box click one field, e.g. **Type**, and drag it into the column headers.
  - Reset the fields per Drag and Drop into the dialog box.
- **Filter the budgets** Use the **Filter** feature, in the **Common** group, to quickly find the needed budget.

Features on the Reports tab

- **Create a report** In the **Create** group, click **Create Report** to create the budget data as a report.
- **Load a report** Select the report from the gallery view by clicking it, in the **Report** group.

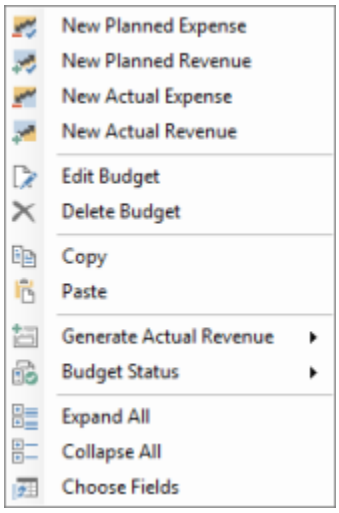
TIP For more information see Create a report.

Information rules in the budget list

- An entry contains the following data: type (planned expenses, planned revenues, actual expenses, actual revenues),sequence number, date, status, name, amount, budget neutral, created by, created on, changed by, changed by.
- Each entry has a **unique number**.
- Each entry has a **status**, which is freely definable.
- The **total amount** of all positions included in the budget is displayed.
- The list is sorted by **date** in descending order. You can group or sort it as an Outlook list

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as New Planned Expense, New Planned Revenue, New Actual Expense, New Actual Revenue, Edit Budget, Delete Budget, Generate Actual Revenue, Copy and Paste, Choose Fields. It has also such features as Expand and Collapse All Groups, Status, where you can define whether the budget is Approved, Rejected or Open. Right-click in the budget list to open the context menu.

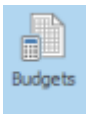


Keyboard shortcut

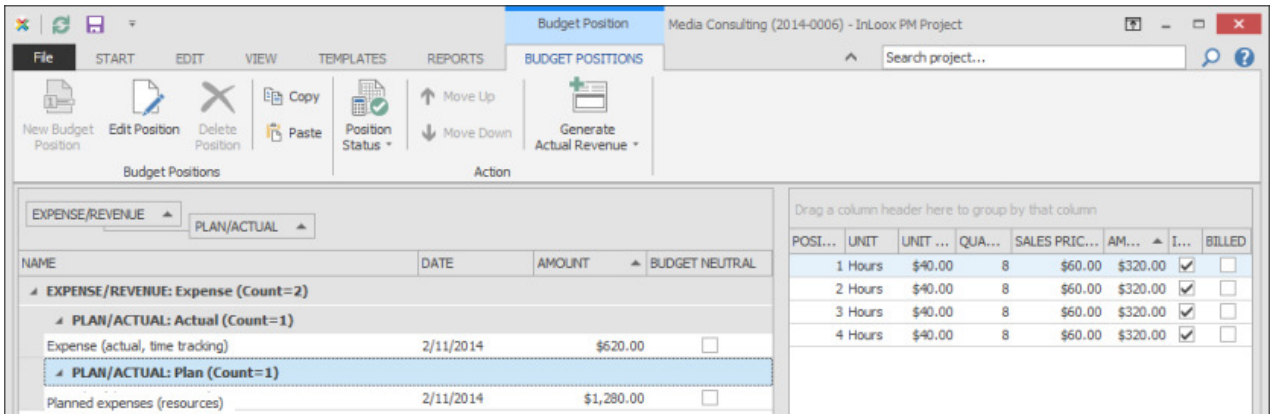
- **CTRG+C** Copy a budget into the clipboard.
- **CTRG+V** Paste a budget from the clipboard to the budget list.

NOTE You have no read permissions, if the lock icon is displayed in the list. In this case no item will be displayed.

Work with the budget positions list

In the project, in the **Start** tab, in the **Section** group, click **Budgets** 

to open the **Budgets** page. On the right side of this page you will see the budget positions list. The following features of the budget positions list are available:



Features on the Budget Positions tab

- **Create a budget position** Choose one budget from the budget list. On the **Edit** tab in the **Budget Positions** group click **New Budget Position**. Alternatively double-click on the empty field in the budget positions list.
- **Edit a budget position** Choose one budget position from the budget positions list. On the **Edit** tab in the **Budget Positions** group click **Edit Position**. Alternatively double-click on an item in the budget positions list.
- **Delete a budget position** Choose one budget position from the budget positions list. On the **Edit** tab in the **Budget Positions** group click **Delete Position**. Alternatively press DELETE key.
- **Copy and paste** Create quickly budget positions with the help of **Copy** and **Paste** feature on the **Edit** tab in the **Budget Positions** group.
- **Change a budget position status** Choose one budget position from the budget positions list. On the **Edit** tab in the **Budget Positions** group click **Position Status**. On the drop-down list click the wanted status.

- **Move a position upward** Choose one budget position from the budget positions list and click arrow **Move Up** in the **Budget Positions** group.
- **Move a position downward** Choose one budget position from the budget positions list and click arrow **Move Down** in the **Budget Positions** group.
- **Create an actual revenue** Click **Generate Actual Revenue** in the **Action** group. An actual revenue can be also generated, e.g. with the revenue positions from the time tracking. Normally an actual revenue is a bill.

Features on the View tab

- **Print a budget positions list** On the **View** tab in the **Common** group click **Print** in the **Common** group to start the quick print feature of the budget positions list. Choose **Budget positions** in the drop-down list.
- **Expand or reduce the budget positions view** Change the view with the help of **Expand All** or **Collapse All o**n the **View** tab, in the **Common** group to make clear the budget positions view.
- **Choose Fields** This feature sorts and organizes the project by important data.
  - On the **View** tab, in the **Common** group click **Choose Fields**. On the dialog box click one field, e.g. **Type**, and drag it into the column headers.
  - Reset the fields per Drag and Drop into the dialog box.
- **Filter the budget positions** Use the **Filter** feature, in the **Common** group, to quickly find the needed budget.

Features on the Templates tab

- **Load budget positions as a template** On the **Templates** tab in the **Action** group click **Load Template**.
- **Save budget positions as a template** On the **Templates** tab in the **Action** group click **Save Template**.

Information rules in the budget positions list

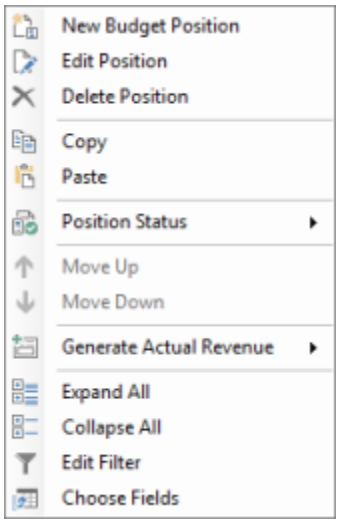
- An entry contains then following data: sequence number, description, group, amount, quantity, unit, unit price, unit selling price (optional for budget types planned expenses and actual expenses), billed (optional for the budget types planned expenses and actual expenses), is billable, position in the list,

created by, created on, changed by, changed on, provision date (for actual expenses(time tracking) only, this is the start date of the time tracking item)

- Each entry has a unique number.
- The total amount of all entries is then displayed, when the list is grouped by according column. Drag a column header you want into the area above the budget positions list.

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as **New Budget Position**, **Edit Position**, **Delete Position**,**Generate Actual Revenue**, **Copy** and **Paste**, **Expand** and **Collapse All Groups**, **Move Up** and **Down.** It has also such feature as **Status**, where you can define whether the budget is **Not billed**, **Billed** or **Note billable**. You can also create an invoice via **Generate Actual Revenue**. Right-click in the budget positions list to open the context menu.



Keyboard shortcut

- CTRG+C Copy a budget position into the clipboard.
- CTRG+V Paste a budget position from the clipboard to the budget position list.

NOTE You have no read permissions, if the lock icon is displayed in the list. In this case no item will be displayed.

Create and edit a budget position

Each budget contains one or more positions. The level of detail that your budget is broken down into is completely up to you.

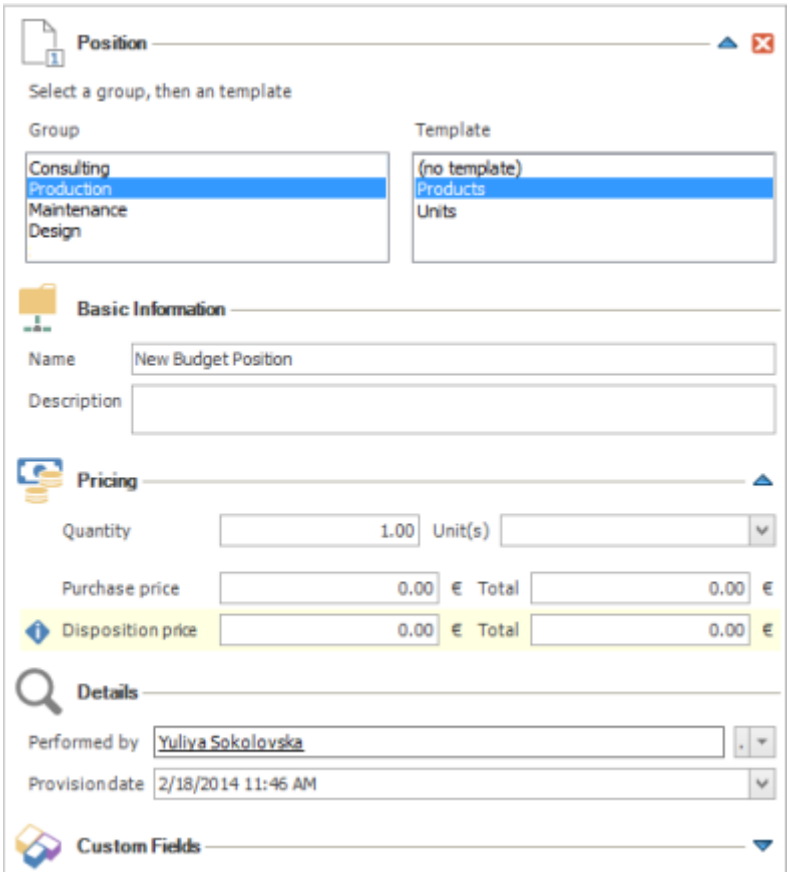
Article content

Create a budget position in the budget position list

Copy positions from the existing budget documents

Create a budget position in the budget position list

1. Open a project with the existing budget.
2. In the project, in the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Budgets** page choose a budget from the budget list, to which you want to add a position. Click **New Budget Position** or **Edit Position**.
4. On the side panel do the following:



- Definition of the group and template in the Position area

  1. Select one group from the **Group** list to which the position belongs. The group defines the structuring of position within the system.
  2. Select the position you want from the **Template** list.

- General information to the budget position in the Basic Information area

  1. In the **Name** field type a name to change the short position name.
  2. In the **Description** area you can add the important information on this position.

     TIP InLoox PM provides you with the range of the formatting features. For the detailed description see Create and change comments in the Customize comments section.

- Determination of the price for the budget position in the Pricing area

  TIP In the **Pricing** area all the fields are filled out automatically, if you have chosen the position with the already added price model. For more information on how to set up the standard pricings model, see Manage budget positions for templates.

  1. In the **Quantity** field enter the quantity of the selected item, e.g. 95 or 2.34. You can also issue a credit items by entering a negative amounts.
  2. In the **Unit(s)** enter a value. The selected **unit** is linked to the according **price per unit**. Select a unit, if there is more than one, or change the unit price manually.
  3. NOTE All prices are without VAT because InLoox records only net earned premiums.
  4. Enter **Purchase** and **Disposition price**.
  5. In the **Total** field you can see now the position amount ("Price per unit multiplied by quantity").

- More information to the budget position on the Details area

  1. In the **Performed by** field click to add a person's name, who creates this budget position document.

     NOTE Use **quick selection** to add a new resource. Click **Arrow** . You can see in the drop-down list all resources, which have been added to the project.
  2. In the **Provision date** choose a date for the provision services or delivery date.
  3. NOTE This date is set automatically as a start date by actual expenses (time tracking) for the time tracking item.

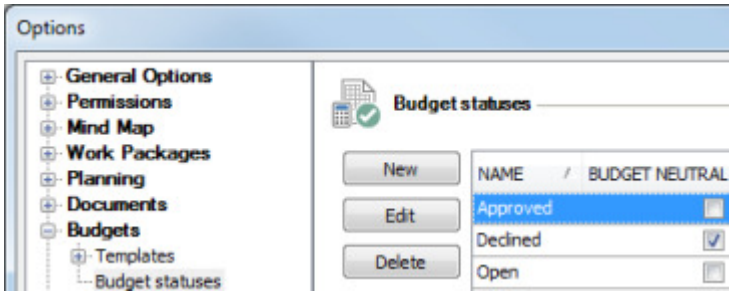
- Further information to the budget position on the Custom tab
    - Click in the previously created custom box and enter a new value for it.

Manage the budget status

You can add a status to each budget document. There are three statuses such as open, approved and rejected in the InLoox PM by default.

In the InLoox PM options you can change the budget statuses and add a new one.

1. Open the dialog box **InLoox PM Options**.
2. Under **Budgets** click **Budget statuses**. On the right side you will see the **Budget statuses** area:



3. Do one of the following:
    - Add a new budget status by clicking **New**. In the **Budget Status** dialog box, in the **New name** filed type a new name. Select the **Budget neutral** control box, if you don't want to include the budget to the totals in the budget overview.
    - Edit the already existing status in the **Budget Statuses** list. Choose one from the list and click **Edit**. In the **Budget Statuses** dialog box you can make you changes (see the first point)
    - Remove the status from InLoox PM by clicking **Delete**.

    TIP Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project. Click **OK** or **Apply** to save the changes in InLoox PM.

WARNING Effects of editing or deleting a budget status:

- The renaming of a status takes immediate effect in all relevant projects.

- On the deletion of a status the relevant budgets have no status until a user selects a new one in the project, on the budget page over the New Budget / Edit budget dialog box.

Generate an invoice

InLoox PM enables to create, send, and follow up project-oriented offers and invoices. Also, ongoing Billing is possible based on project time tracking. Automatic billing numeration avoids forgetting any expenses or charging them twice.

Article content

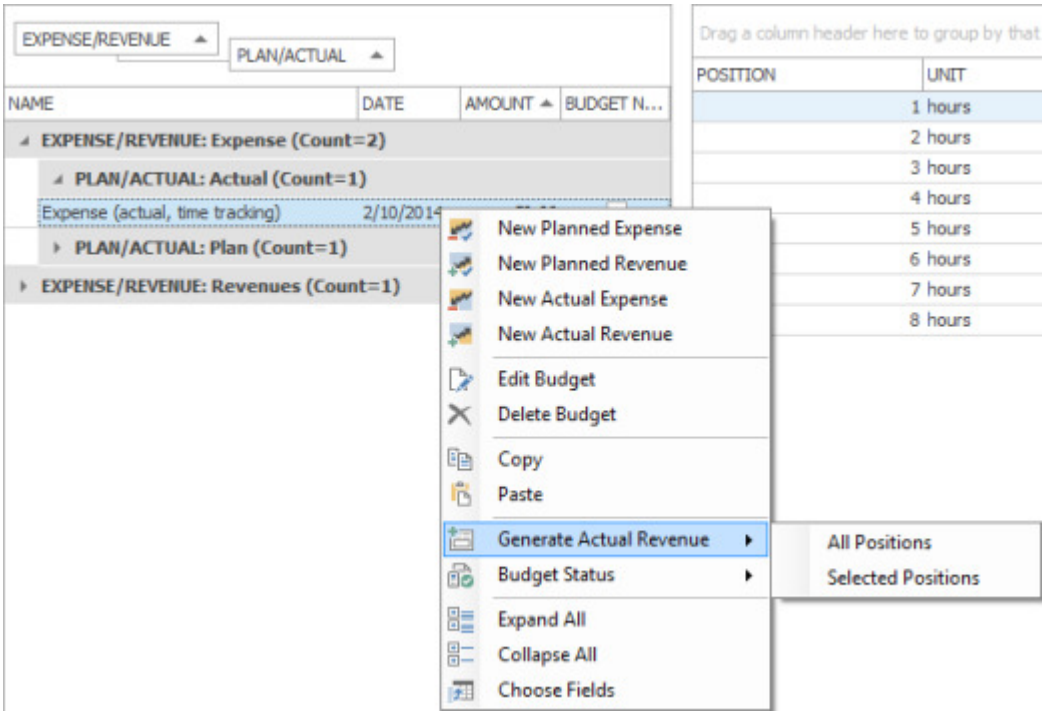
Generate an invoice

Issue a report for the budget

Generate an invoice

1. Open an existing project with the budget.
2. In the project, on the **Start** tab, in the **Section** group, click **Budgets**.
3. Choose a budget from the budget list, to which you want to generate a bill (actual revenue).
4. On the **Edit** tab, in the **Action** group click **Generate Actual Revenue**.
   Alternativly you can generate a bill from the context menu via **Generate Acutal Revenue**. Right-click in the budget list to open the context menu and choose**Generate Actual Revenue**
5. Choose from the drop-down list between **All Positions** and **Selected Positions**.

6. The actual revenue is generated together with the positions of the budget document you have chosen.



Issue a report for the budget

Issue a report to each budget document and send it as a document via email.

1. On the **Budget** page, in the budget list, choose a budget, to which you want to issue a report.
2. Click the **Reports** tab.
3. Do one of the following:

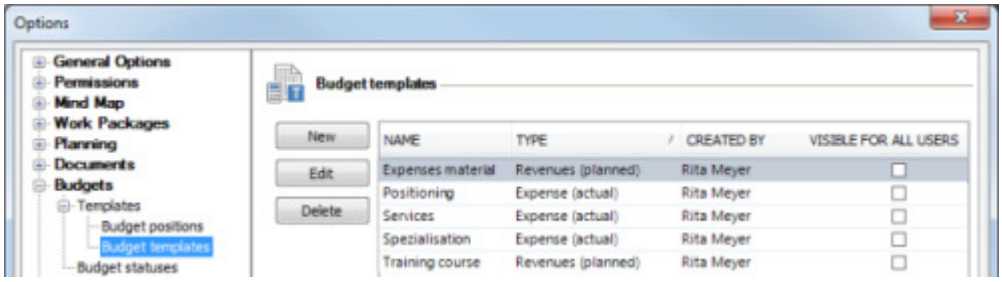
   - In the **Create Reports** group click **Create Report**, in the **New Report** dialog box, in the **Report** tab choose a template from the **Use this template** drop-down list. Filter the data you wish in the **Budgets** tab and then click **Create**.
   - In the **Reports** group choose a report you want from the gallery view, e.g. **Offer**. In the **Print Options** dialog box choose the output format, e.g. Excel, PDF or Word document. Click **Start**.
     Such report templates as **Expenses / Revenues**, **Budget overview** or **Transaction list** are included into the standard delivery.

Manage budget documents for templates

Add, change or delete the budget documents in the InLoox PM options. The recurring budget positions can be added to this budget documents.

IMPORTANT To manage the templates you need the InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.
2. Under **Budgets** click **Templates** and then **Budget templates**. On the right side you will see the **Budget documents** area:



3. Do one of the following:

   - Add a new budget document template by clicking **New**.

     - In the **New Budget Document Template** dialog box choose a budget type in the **Type** drop-down list.
     - Select the **Visible for all users** control box, if you want to have this option.
     - Type a new name in the **Name** field.
     - You can add a position by clicking **New**. Change the budget positions list by clicking **Edit**, **Delete**, **Up** or **Down**. Click **OK** after you made all changes you wanted.

       TIP For the detailed description about the features in the dialog box, see Create and edit a budget position.

   - Edit the already existing budget document template in the **Budget documents** list. Choose one from the list and click **Edit**. In the **Edit Budget Document Template** dialog box you can make changes you want (see the first point).

   - Remove the budget document template from InLoox PM by clicking **Delete**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

NOTES

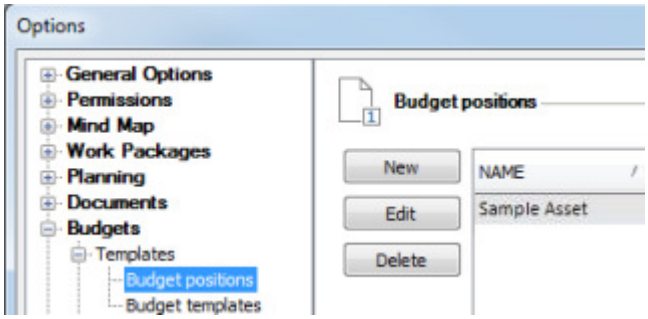
- The name of each budget document template should be short and unambiguous.
- The description in the **Name** field can include wildcard characters, e.g. ...size is x units...

Manage budget positions for templates

The budget documents contain the budget positions which can be called up by the users in all InLoox PM projects on the budget page. The budget positions can be edited or deleted in the InLoox PM options as required.

IMPORTANT To manage the templates you need the InLoox PM administrator permissions.

1. Open the dialog box **InLoox PM Options**.
2. Under **Budgets** click **Templates** and then **Budget positions**. On the right side you will see the **Budget positions** area:



3. Do one of the following:

   - Add a new budget position by clicking **New**.

     - In the **New Position** dialog box type a new name in the **Name** field. Type additional information in the **Description** field.
     - Enter the number you want in the **Quantity** field.
     - In the **Pricing** list click **New** to add a new position. In the **New Unit** dialog box enter a **Name**, **Purchase price** and **Disposition price** and click **OK**.

- Choose a group in the **Group(s)** list.
  The created pricing model will be loaded, if you select this position in the **New Budget Position** / **Edit Budget Position** dialog box in the project.
- Change the budget positions list by clicking **Edit**, **Delete**, **Up** or **Down**.
  Click **OK** after you made all changes you wanted.
- Click **OK**.

- Edit the already existing budget position in the **Budget positions** list. Choose one from the list and click **Edit**. In the **Edit Position** dialog box you can make changes you want (see the first point).
- Remove the budget position from InLoox PM by clicking **Delete**.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

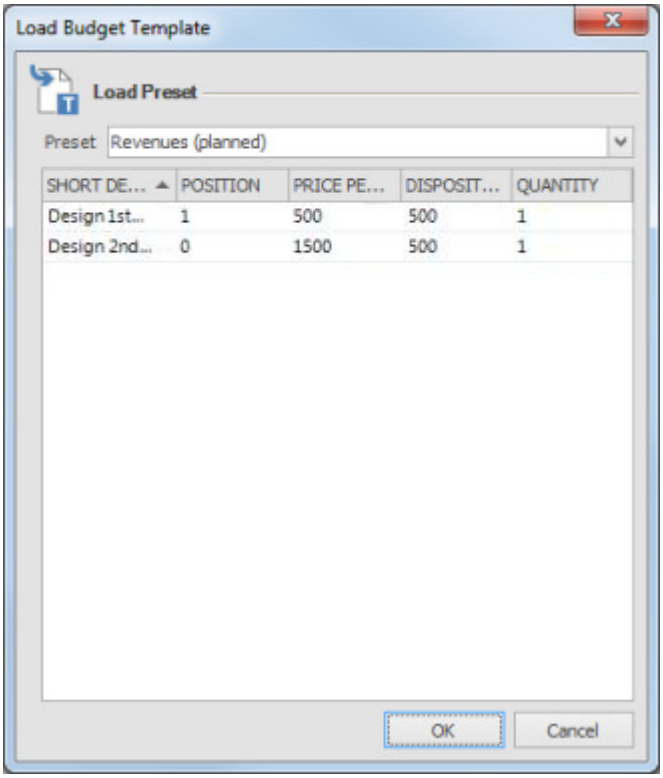
NOTES

- The name of each budget position should be short and unambiguous.
- The description in the **Description** field can include wildcard characters, e.g. ...size is x units...

Load a budget template

Define recurring budgets. The templates allow you to load complete offers, invoices or project estimates in one simple step.

1. Open the project with the existing budget.
2. In the project, in the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Budgets** page, in the budget list, choose a budget.
4. On the **Template** tab, in the **Action** group, click **Load Template**.

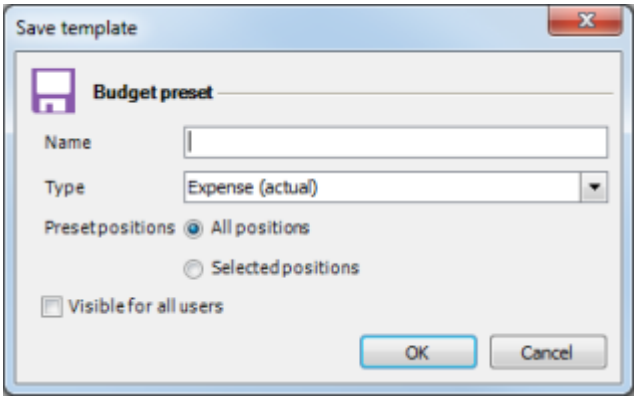


In the **Load Budget Template** dialog box the included position of the templates are displayed.

5. In the **Name** drop-down list choose a name of the template for the budget.
6. Click **Load**.

Save a budget template

1. Open the project with the existing budget.
2. In the project, in the **Start** tab, in the **Section** group, click **Budgets**.
3. On the **Budgets** page, in the budget list, choose a budget.
4. On the **Template** tab, in the **Action** group, click **Save Template**.



5. Type a new name in the **Name** field.
6. Choose a budget type in the **Type** drop-down list.
7. Choose whether you want to have in your template all positions or only selected.
8. Select **Visible for all users** control box, if you wish.
9. Click **OK**.

Budget overview

Display the budget overview

Compare planned and actual time and expense values on a real-time basis. View single activities, resources or even entire projects – you won't lose deviations of your project anymore.

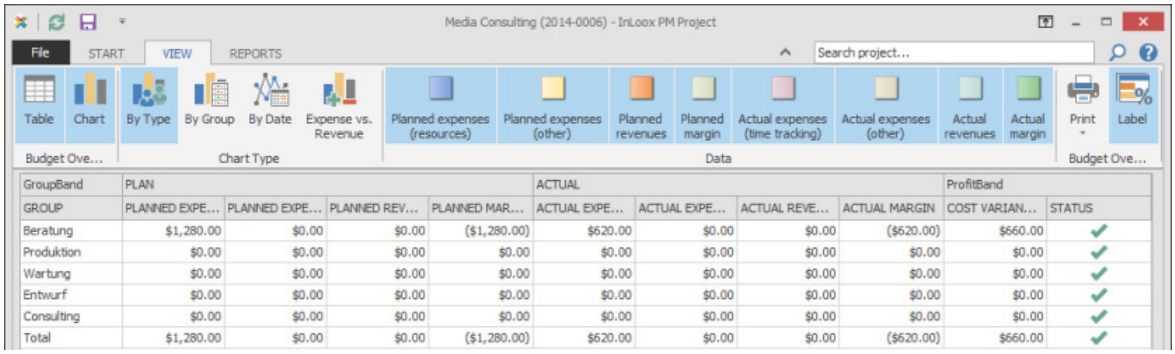
Article content

Tabular overview

Graphical overview

Tabular overview

1. Open a project with the existing budget.
2. In the project, on the **Start** tab, in the **Section** group, click **Budget Overview**.
3. On the **View** tab, in the **Budget Overview** group click **Table**.



GroupBand	PLAN				ACTUAL				ProfitBand	
GROUP	PLANNED EXPE...	PLANNED EXPE...	PLANNED REV...	PLANNED MAR...	ACTUAL EXPE...	ACTUAL EXPE...	ACTUAL REVE...	ACTUAL MARGIN	COST VARIAN...	STATUS
Beratung	$1,280.00	$0.00	$0.00	($1,280.00)	$620.00	$0.00	$0.00	($620.00)	$660.00	✓
Produktion	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	✓
Wartung	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	✓
Entwurf	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	✓
Consulting	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	✓
Total	$1,280.00	$0.00	$0.00	($1,280.00)	$620.00	$0.00	$0.00	($620.00)	$660.00	✓

In the table you will see the figures cumulated by **Group**.

Control budgets

- Check the totals under the columns Actual expenses (time tracking), Actual expenses (other), Actual revenues and Actual margin.
- Budget overruns are highlighted in color, making it easy to identify unplanned additional expenses. If the line is marked in red, the negative result is expected.
- Use the views to control more projects simultaneously.

    1. Click **Projects** on the **Outlook Ribbon** to switch to the InLoox PM project list.

        NOTE In Outlook 2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

    2. In the **InLoox PM** tab, in the **View** group, click **More Views**.
    3. In the drop-down list choose the saved view, e.g. project controlling.

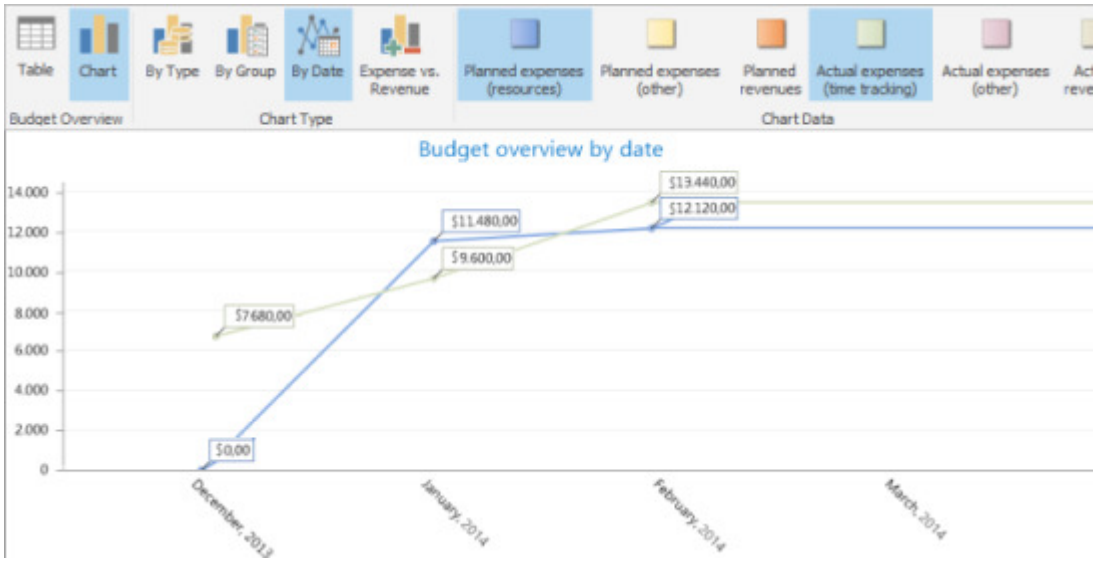
- As a alternative you can use also **Choose fields** for the project controlling.

Export the report to Microsoft Excel

1. Click **Reports** tab.
2. In the **Reports** group, in the gallery view click **Budget Overview**.
3. In the **Print Options** dialog box choose settings you want, e.g. Excel as an issue format.
4. Click **Start**.
5. Choose whether you want print, save or send the document per email.

Graphical overview

1. Open a project with the existing budget.
2. In the project, in the **Start** tab, in the **Section** group, click **Budget Overview**.
3. On the **Budget Overview** page, in the **Budget Overview** group click **Chart**.



4. You have the opportunity to view different budget chart types. In the **Chart Type** group choose the desired chart between **By Type**, **By Group**, **By Date** or **Expense vs. Revenue**)

Control budgets

Create a graphical overview to control several projects. Do following steps:

1. Click Projectlist on the Outlook Ribbon to switch to the InLoox PM project list overview.

   NOTE In Outlook 2007 click InLoox PM Folder in the InLoox PM Toolbar.

2. In the InLoox tab, in the View group, click Dashboard.
3. In the Dashboard view adjust your individual overview.

   TIP For more information see the category Dashboard view.

What do the fields and chart types of the budget overview mean?

Compare planned and actual expenses and revenues with the help of the budget overiew. The graphic representation gives you an instant overview of your budget status.

Below you will find the detailed description of the table and chart types.

NOTES

- Click on the corresponding buttons in the chart data area to make series invisible or visible.
- In the **Budget Overview** group click on **Show Values** to display series labels and currencies.

Article content

Description of the tabular overview

Chart type by type

Chart type by group

Chart by date

Chart type expense vs. revenues

Description of the tabular overview

The **overview** area gives an ongoing comparison between the amounts of the management, planning and budgets pages in the table. The list represents you all amounts cumulated by group:

Column	Description
Group	Each group has one row. NOTES Amounts in the columns 2-10 are cumulated by group. The row amount shows the totals from each column. An internal price per hour is recorded for each group. If you insert an individual price per hour for the resources, the group costs will be ignored.
Planned expenses (resources)	Expenses of all activities from the planning page Planning page. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing price for each activity. All activity expenses are cumulated by group.

Column	Description
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of planned expenses type are totalled and/or cumulated by group.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of planned revenues type are totalled and/or cumulated by group.
Planned margin	Variance between planned revenues and planned expenses (planned expenses (resources) and planned expenses (other)). Method: planned revenues column minus (planned expenses (resources) column plus planned expenses (other) column).
Actual expenses (time tracking)	Actula expenses (time tracking) from the budget page. Method: Actual expenses (time tracking) are calculated automatically: Time tracking items from the time tracking page multiplied by the group purchasing costs cumulated by group.
Actual expenses (other)	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of actual expenses type are totalled and/or cumulated by group.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of actual revenues type are totalled and/or cumulated by group.
Actual margin	Difference between actual revenues and actual expenses (actual expenses (time tracking) and actual expenses). Method: actual revenues column minus (actual expenses (time tracking)column plus actual expenses column).

Column	Description
Cost variance (plan vs. actual)	Difference between actual margin and planned margi. Method: actual margin column minus planned margin column.
Status	A negative amount in the 10th column (debit/credit) is marked red. In this case the actual margin is lower than the planned margin. This can mean the following depending on the project focus: expenses exceed revenues revenues are lower as expected Expenses are higher as expected.

It is possible to display the total costs, revenues, profit and cost overruns in the InLoox PM project list.

Chart type by type

The chart type By type gives an ongoing comparison between the amounts of the management, planning and budgets pages. The list represents you all amounts cumulated by group:

Element	Description
Planned expenses (resources)	Costs of all activities from the planning page. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing costs for each activity. All activity expenses are cumulated by group
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of planned expenses type are totalled and/or cumulated by group.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of planned revenues type are totalled and/or cumulated by group.

Element	Description
Actual expenses (time tracking)	Actual expenses (time tracking) from the budget page. Method: Actual expenses (time tracking) are calculated automatically: Time tracking items from the time tracking page multiplied by the group purchasing costs cumulated by group.
Actual expenses	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of actual expenses type are totalled and/or cumulated by group.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of actual revenues type are totalled and/or cumulated by group.

Chart type by group

The chart type By group gives an ongoing comparison between the amounts management, planning and budgets pages. The list represents you all amounts cumulated by group:

Element	Description
All columns	Cumulated revenues (planned revenues, actual revenues) and expenses (planned expenses, actual expenses (time tracking), actual expenses) per InLoox PM used group. Method: Expenses (planned, resources) per group Expenses (planned, other) per group Expenses (actual, time tracking) per group Expenses (actual, other) per group Revenues (planned) per group Revenues (actual) per group.

Chart by date

In the chart By date each row shows the cumulated revenues (planned revenues, actual revenues) and expenses (planned expenses, actual expenses (time tracking), actual expenses) of the project within a pre-defined time period:

Element	Description
Planned expenses (resources)	Costs of all activities from the planning page.. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing costs for each activity. All activity expenses are cumulated by record time
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of planned expenses type are totalled and/or cumulated by record time.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of planned revenues type are totalled and/or cumulated by record time.
Actual expenses (time tracking)	Actual expenses (time tracking) from the budget page. Method: Actual expenses (time tracking) are calculated automatically: Time tracking items from the time tracking page multiplied by the group purchasing costs cumulated by record time
Actual expenses	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of actual expenses type are totalled and/or cumulated by record time.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of actual revenues type are totalled and/or cumulated by record time.

Chart type expense vs. revenues

The chart type Expense vs. revenues displays the ongoing comparison between the amounts in management, planning and budgets pages. The list represents you all amounts, cumulated by revenues (planned revenues, actual revenues) and expenses (planned expenses, actual expenses (time tracking), actual expenses):

Element	Description
Planned expenses (resources	Expeneses of all activities from the planning page. They include the resources with recorded working time. Method: The total work time of all resources is multiplied by the group purchasing costs.
Planned expenses (other)	All planned expenses from the budget page. Method: Budget documents of type planned expenses are totalled.
Planned revenues	All planned revenues from the budget page. Method: Budget documents of type planned revenues are totalled.
Actual expenses (time tracking)	Actual expenses (time tracking) from the budget page. Method: Actual expenses (time tracking) are calculated automatically: Time tracking items from the time tracking page multiplied by the group purchasing costs.
Actual expenses	Actual expenses from the budget page (except actual expenses (time tracking)). Method: Budget documents of type actual expenses are totalled.
Actual revenues	Actual revenues from the budget page. Method: Budget documents of type actual revenues are totalled.

New features

Inspired by the suggestions of project managers from all around the world, InLoox PM 8 for Outlook offers powerful, new features and an easy-to-use user interface.

The following topcis are available.

Topics

The Highlights in Version 8

Clarity and Convenience

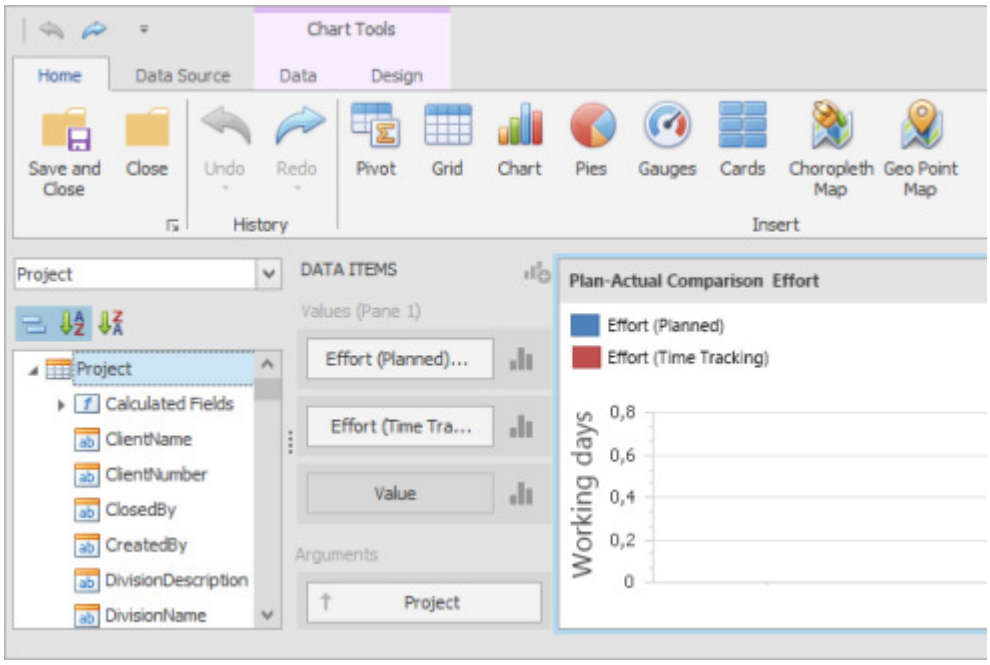
Communicate and Document

Draft and Plan

Manage Resources

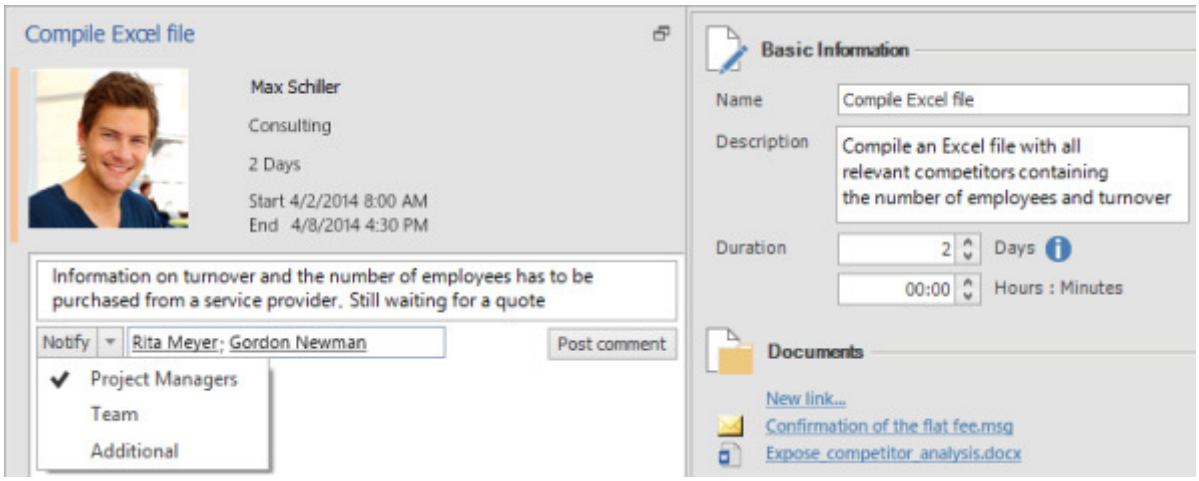
The Highlights in Version 8

Dashboards at a whole new level



Create custom-tailored Dashboards, choosing from different diagram options and data sources. This way, you always have an overview of key figures, data and target values that are essential to your projects' success – clearly structured and real-time up-to-date.

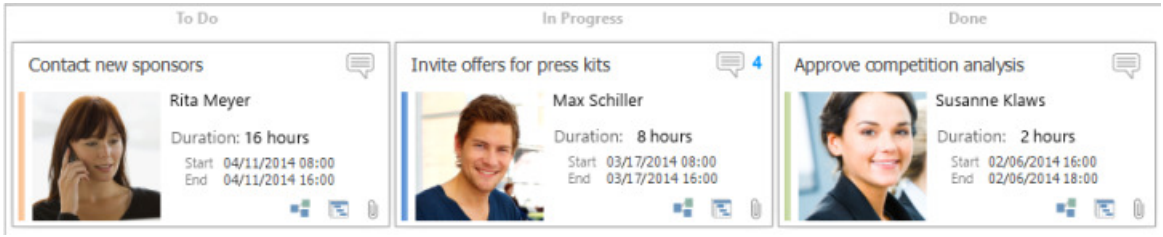
Work packages & team tasks



Create, assign and organize team tasks in work packages without having to create a timed project plan. Simply leave a comment to share important, work-package related details.

If time planning becomes necessary, you can easily add work packages to an activity via Drag'n'Drop. Enable the auto notification mode and be informed of all changes to your work packages.

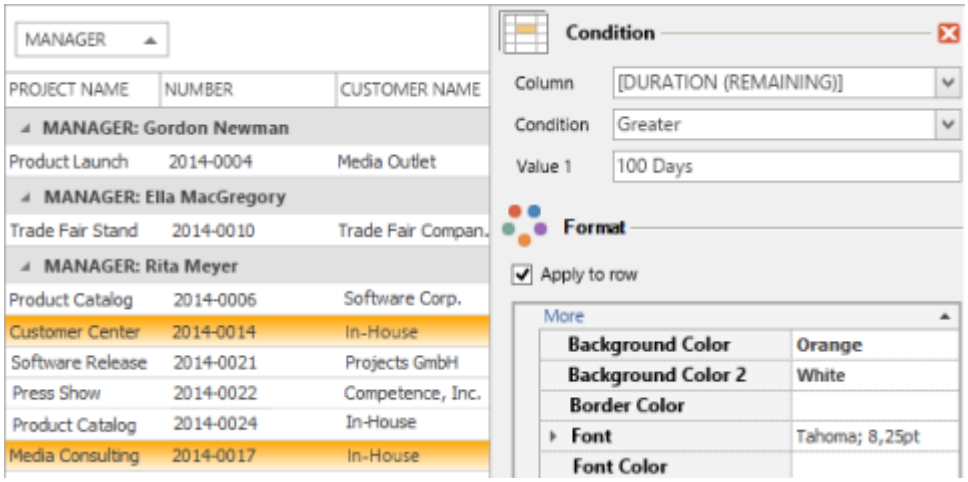
Agile project management with Kanban



Agile teams can now organize themselves with a customizable Kanban view. Change the status and the assignment of a task simply via Drag'n'Drop. All team members see at a glance which tasks are pending, which ones are currently in progress and which ones are already done.

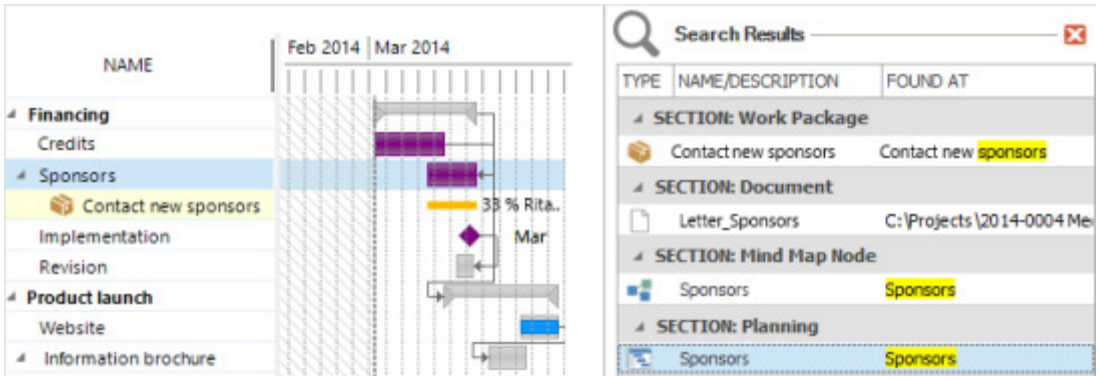
Clarity and Convenience

Better overview with the project list



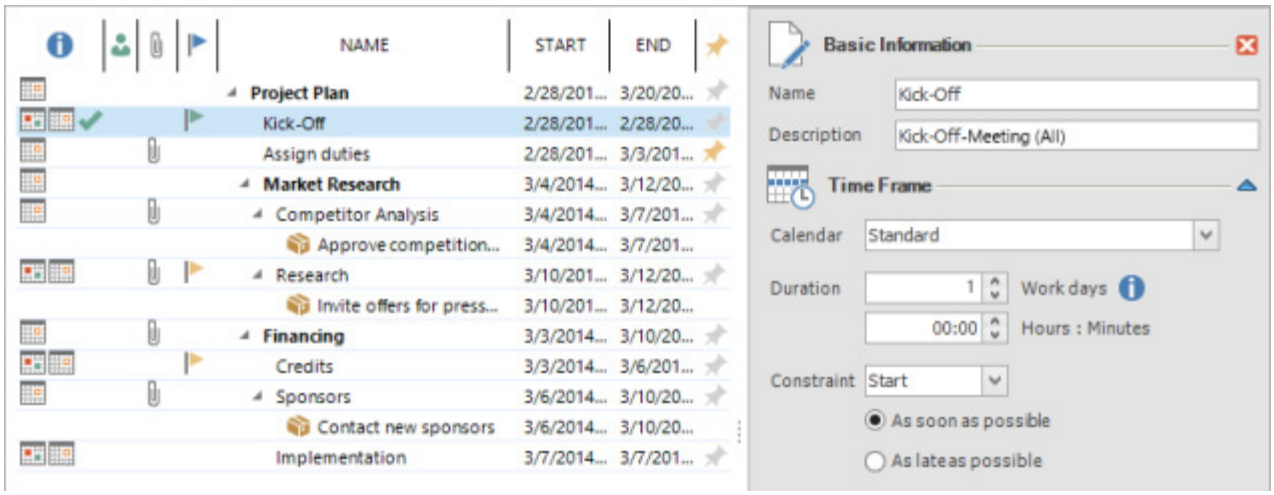
Use the project list as an early warning system and highlight columns according to personalized rules, e.g. to identify projects that are at risk to overrun the time or budget limits. Moreover, you can create your personal list of prioritized projects.

Project search



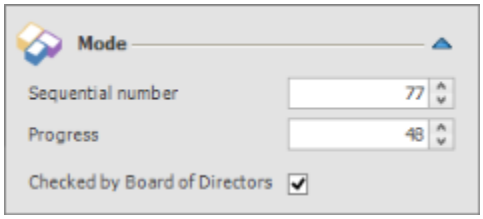
We put an end to digging for project information. With the full text search you can screen your entire project and navigate directly to the search results.

Even better usability



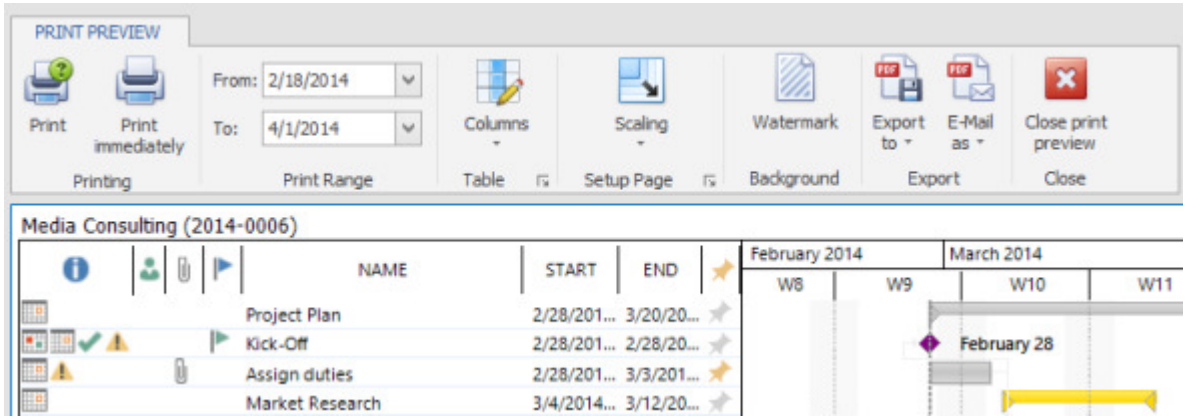
The new user interface makes editing project data easier than ever. Edit information directly in the context-sensitive side panel – without opening a single dialogue.

Speed up your project work



InLoox PM 8 makes your life easier and accelerates the editing of project information. You can dynamically reload new data and immediately see changes without leaving the project. Organize custom fields as needed and select a display name for them.

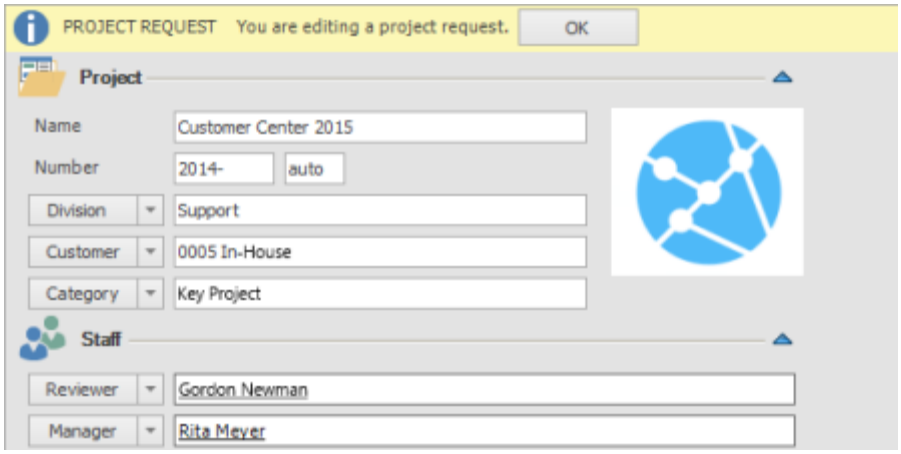
Print assistant



Use the improved print view in the planning, mind map and resource overview section to scale and format print documents according to your preference. Use your own colors and logos to enhance print documents and export data to Microsoft Excel for further editing.

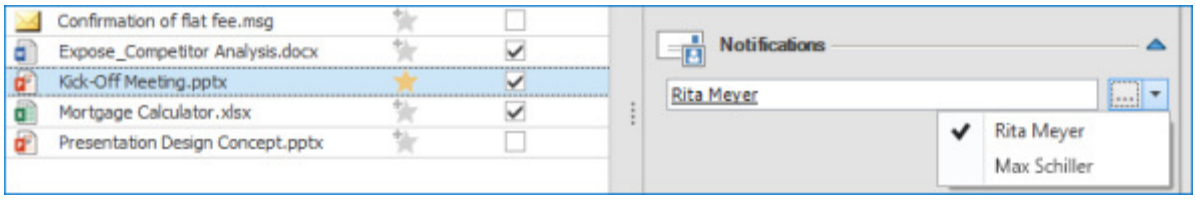
Communicate and Document

Approval workflow



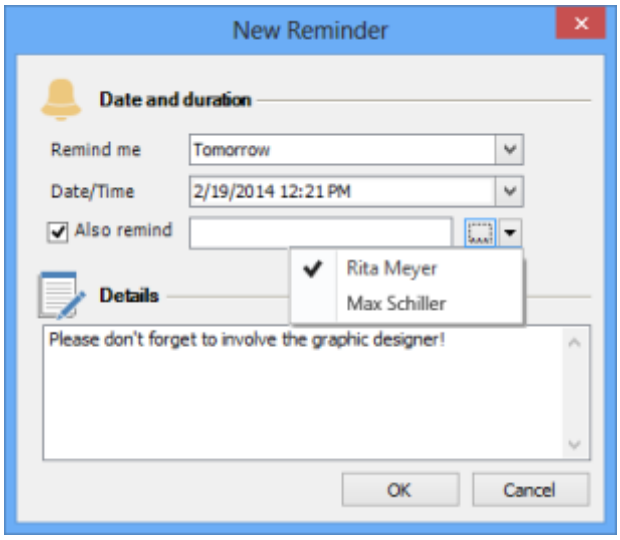
Now, team members can submit project requests and have them approved by their supervisor. Project managers and executives can easily keep track of the company's project portfolio and team members have more planning security for their projects.

Auto notifications



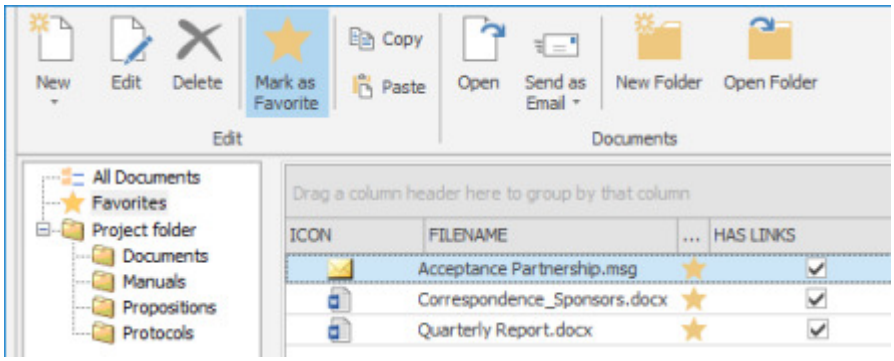
Reduce the amount of e-mails, phone calls and meetings. If you enable the auto notification mode, InLoox PM will immediately inform you about changes made to the project plan, time tracking entries or project documents.

Reminder



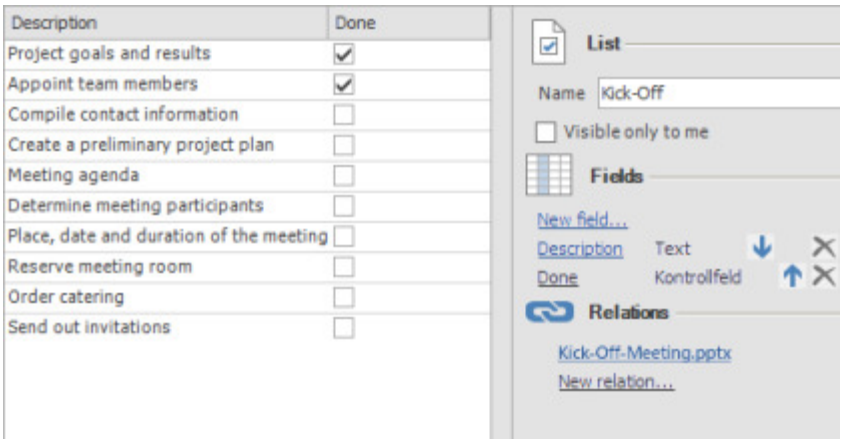
Get notified about upcoming start dates and work package deadlines. You decide how and when you receive a notification. This ensures a smooth project flow and that all team members can start their work at the right time.

Document



Define your personal list of prioritized documents that you use most often. Additionally, you can now organize your documents via Drag'n'Drop. You can enable the auto notification mode to be informed about changes to project documents.

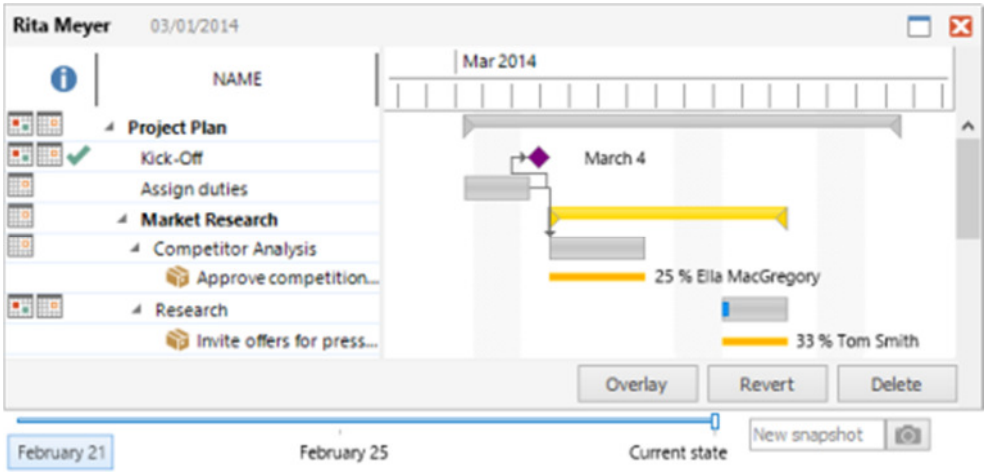
Lists



Create check lists for your projects in a list and index card view. This way, you can structure and organize project information even before generating work packages and a timed project plan.

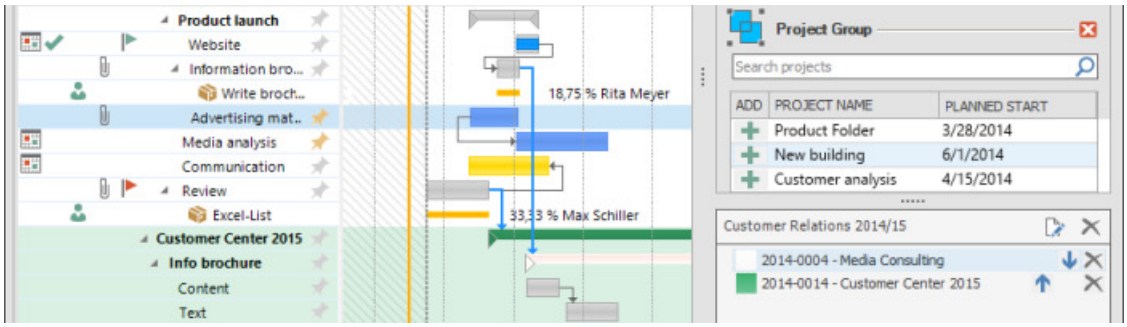
Draft and Plan

Planning snapshot



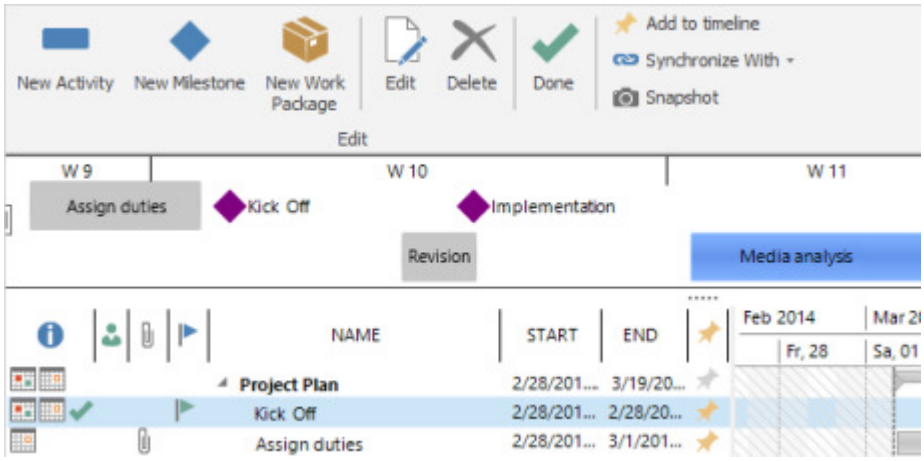
Record the current state of your Gantt planner, compare the project plan of different points in time and instantly restore a previously saved status.

Project groups



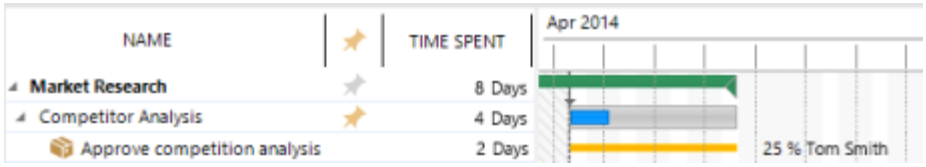
Connect the plans of interdependent projects to identify cross-projects dependencies and resource bottlenecks. This allows you to maintain a consistent overall

Timeline



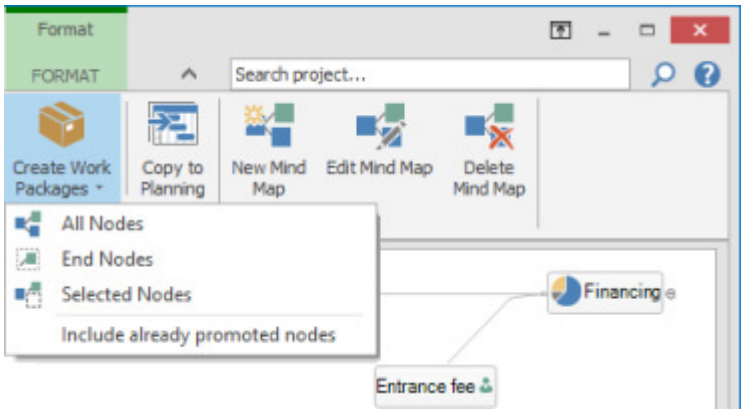
Highlight important activities and milestones, e.g. to gain an overview or to present a condensed version of the project plan to customers. All highlighted activities are presented chronologically on a timeline.

Additional information directly in the Gantt chart



InLoox PM 8 saves you the trouble of gathering information and shows all relevant planning elements, such as resource capacities, assigned work packages or plan/actual comparisons, directly in the Gantt chart.

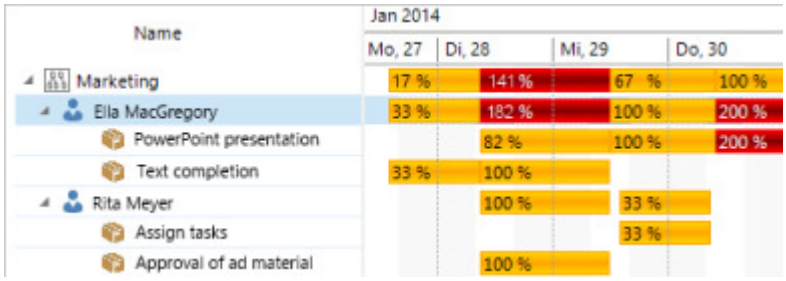
Optimized Mind Mapping



The Mind Maps in InLoox PM 8 are easier to use and more powerful than ever. Import MindManager© files, freely arrange nodes, and copy the Mind Map structure to the project plan or convert Mind Map nodes to work packages.

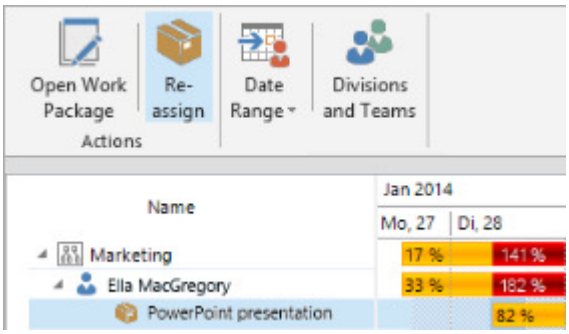
Manage Resources

Team and department workload



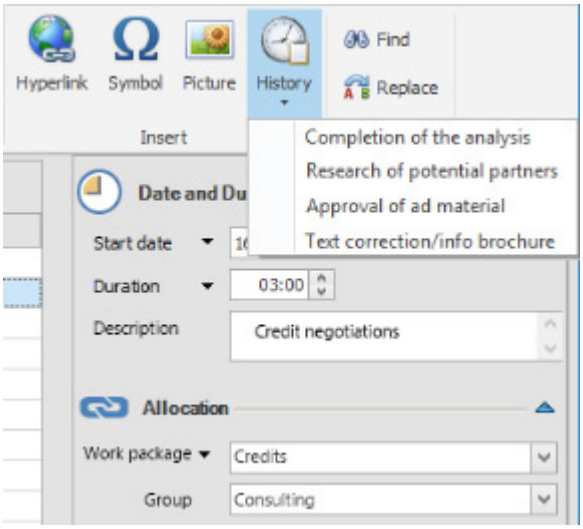
Define work groups and departments and monitor their real-time workload. On a group level, you can see how the workload and spare capacities are distributed across teams and departments.

Re-assign work packages



Now you can re-assign work packages at the push of a button to keep the workload balanced between your project resources.

Time tracking



InLoox PM saves you a lot of time when it comes to describing time tracking entries: You can select from frequently used description texts. In addition to that, time tracking entries can now simultaneously be assigned to a group and a planning activity.

Dashboard view

Topics

Adjust the dashboard view

Dashboard standard views

Create a new dashboard

Designing dashboards

Adjust the dashboard view

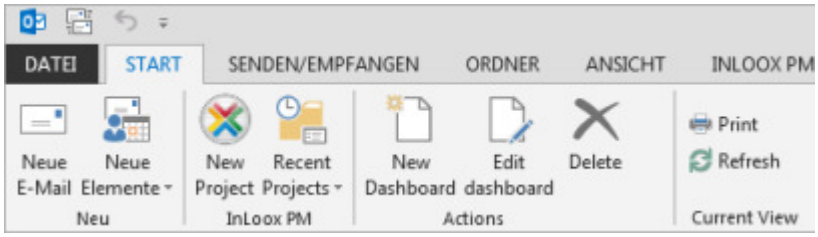
The dashboard view shows you the main project areas. You can get all important information to the current projects without opening one and compose your own dashboard view from the different widgets.

1. To open the dashboard view, do one of the following.

   - Click **InLoox PM** tab on the **Outlook Ribbon** and then **Dashboard**, in the **Views** group.

     NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Dashboard** in the InLoox PM project list.

   - Click **Dashboard** in the tree structure on the left.



2. On the **Start** tab, perform one or more of the following actions:

   - Create a personal dashboard view On the InLoox PM Ribbon, in the Start tab, in the Current View group, click Widgets.

     TIPS

     - To learn how to add a new dashboard view, see Create a new dashboard.

- To learn how to adjust the view in the dashboard designer, see Designing dashboard.

- **Edit an existing dashboard view** Select one view from the tree structure on the left and click **Edit dashboard**, in the **Actions** group.
- **Remove anexisting dashboard view** Select one view from the tree structure on the left and click **Delete dashboard**, in the **Actions** group.
- **Print a dashboard view** Select one view from the tree structure on the left and click **Print**, in the **Current View** group.
- **Refresh** All changes are updated and the view is reloaded when clicking the **Refresh** button in the **Current View** group.

Information rules in the dashboard view

In the dashboard view on the side panel you can filter the project information by clicking on certain project from the list.

Symbols in the dashboard view

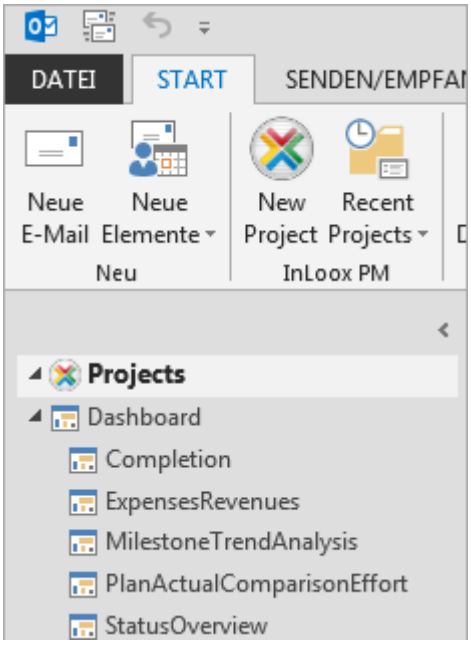
Clear filter.

Dashboard parameter.

Export feature. The view will be exported as PDF or image.

Dashboard standard views

The InLoox PM dashboard provides you with the standard views about all relevant and project-related information to analyze, control and compare your projects. You have always all key data, developments and target values at a glance - up-to-date and clearly designed.



Create your personal dashboard with an individual selection of widgets. The dashboard provides you with a graphical overview and lists.

TIP Create your personal dashboard. For more information, see Create new dashboard.

In this table you find the descriptions of the standard views to monitor the project information.

Widgets	Description
Expenses/revenues	Shows the system-wide all planned expenses and revenues compared with the actual values. The dashboard provides you with different time views - month, quartet and year.
Percent complete	This dashboard displays the comparison between the planned and actual percent complete. The planned percent complete is defined as (the sum of the work effort all work packages in the planning (work packages< today)) / (the sum of work effort all work packages in the planning). The actual percent complete is defined as (the sum of the work effort all done work packages) / (the sum of the work effort all work packages)
Milestone trend analysis	Represents the analysis of the dates in a project and compares them with the planned data. The dashboard visualizes the date delay of the milestone in the

Widgets	Description
	project. With this view you can quickly see the deviations from the planned schedule.
Project status overview	Shows an overview of the progress and the cost-effectiveness of your projects.
Plan/actual comparison	Shows planned and actual hours of your projects.

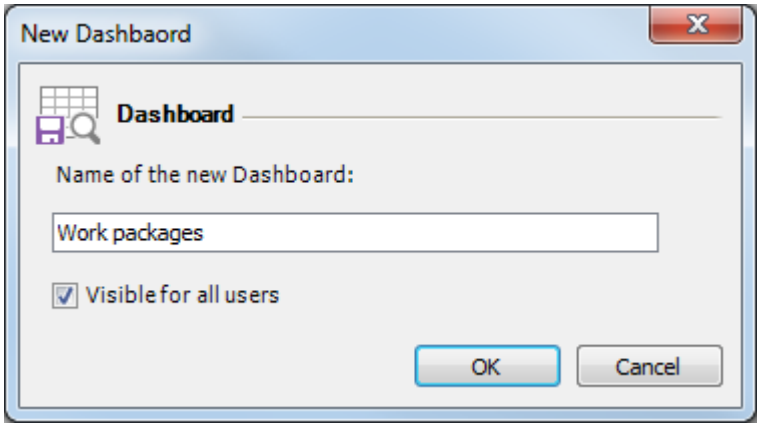
Create a new dashboard

To open the dashboard view, do one of the following.

1. Click **InLoox PM** tab on the **Outlook Ribbon** and then **Dashboard**, in the **Views** group.

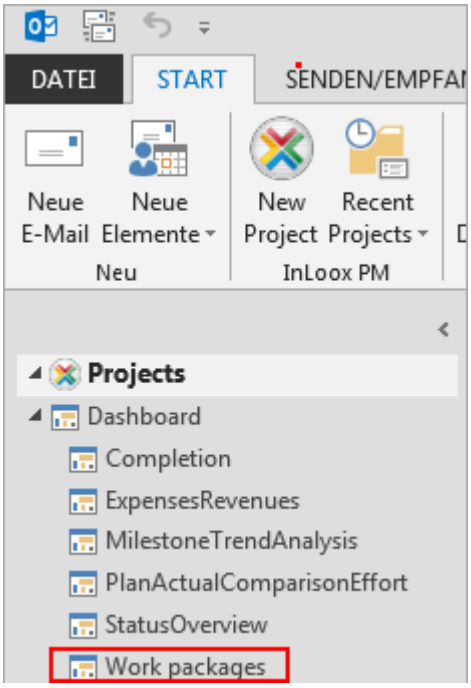
   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Dashboard** in the InLoox PM project list.

2. Click **Dashboard** in the tree structure on the left.
3. In **InLoox PM ribbon, on the Start** tab, in the **Actions** group, click **New Dashboard**.
4. In the **New Dashboard** dialog box enter a name.



5. Activate the check box, if you want to make your dashboard visible for all users.

6. This will invoke the **Dashboard Designer** dialog box.
7. Wenn the new dashboard is ready, click **Save and Close** in the **Dashboard Designer**, on the **Home** tab.
   The new view is displayed in the **Dashboard** tree view on the left.



Designing dashboards

This section guides you through the process of creating a dashboard.

To open the Dashboard Designer, click **New Dashboard** or **Edit dashboard** on the **Start** tab.

The following topics are available.

Topics

Getting started

Creating a data source

Providing data

Using dashboard parameters

Creating dashboard items

Binding dashboard items to data

Data shaping

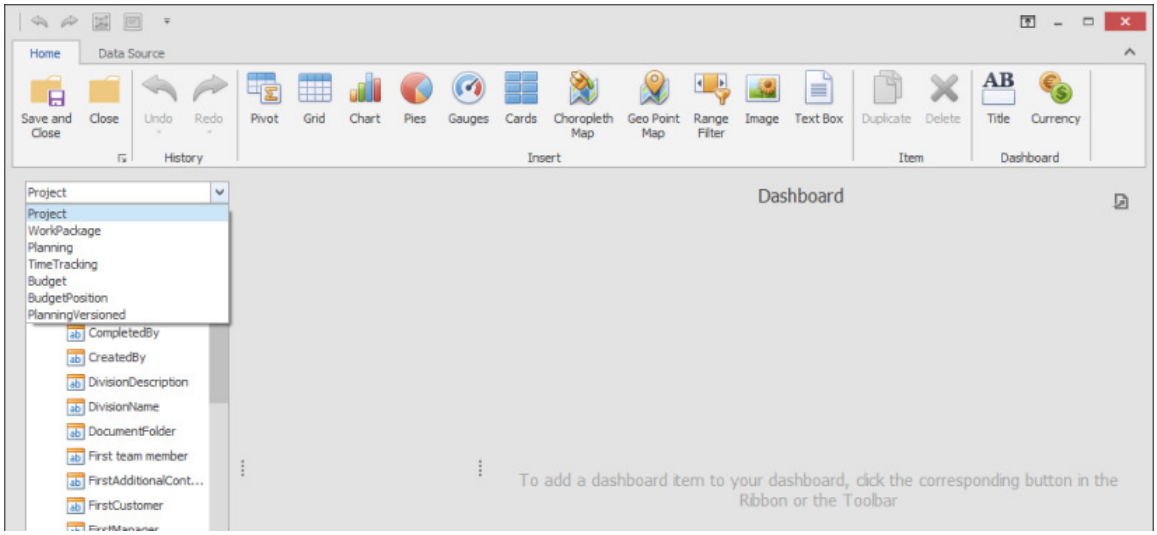
Interactivity

Dashboard layout

Getting started

In this lesson, you will learn how to create your dashboard using the **Dashboard Designer**.

1. First, open the Dashboard Designer.
2. The dashboard designer should appear as follows.



3. You can use InLoox PM Database or connect to another one.

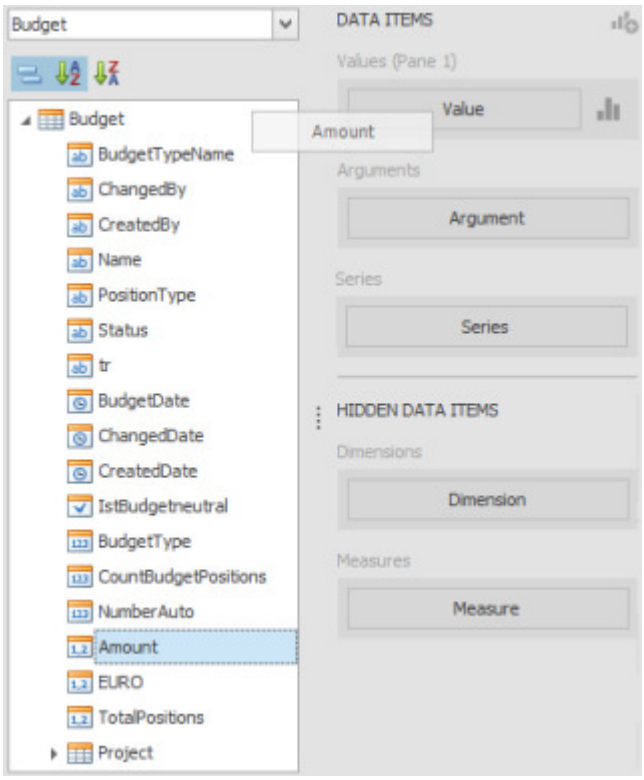
TIPS

- The InLoox PM data source is on the left site panel of the window. You can choose between different data sources as **Project**, **Work Packages**, **Planning**, **Time Tracking**, **Budget** and **Budget Position** from the drop-down list.
- Learn how to create a new data source, see Creating a data source.

4. Create **Dashboard Items** and **Bind** them to **Data**.
   Learn by example how to create a **Comparison of budget types** dashboard view.

   1. Click the wanted dashboard item on the Ribbon, e.g. **Chart**.
   2. Select **Budget** in the InLoox PM **Data Source Browser**

5. Drag the **Amount** field to the **Values** placeholder in the **Values** section.



6. Then place the **Name** and **Number** fields (for projects) in the **Arguments** section.

   - After drag the **Name** field (for budget types) in the **Series** section.

7. Click **Save and Close** on the Ribbon.
   The dashboard view **Comparison of budget types** is now ready.

Creating a data source

The **Create data source** wizard allows you to create a new data source by specifying the required connection parameters (for instance, the server name, the database name, user credentials, the path to a data file, etc.).

Creating a data source and connecting to data

Creating a data source in OLAP mode

Composing a data source

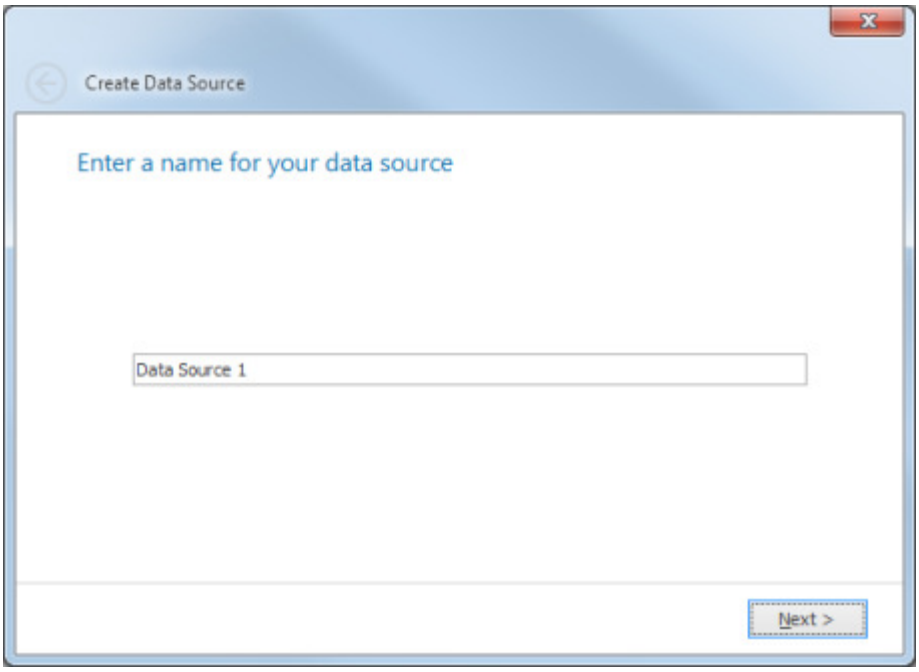
Creating a data source and connecting to data

You can connect to various types of databases and data files using the **Create Data Source** wizard. This wizard allows you to establish a connection to the data store by providing the required connection parameters.

NOTE InLoox PM provides you with its own project data sources on the side panel left in the dashboard designer.

Create Data Source Wizard

1. **Data Source Name** On the first page, enter the data source name and click **Next**.



2. **New or Existing Data Connection** On this page, specify whether to use one of the existing connections or create a new connection, and click **Next**.

   NOTE This page only appears if you have already established a data connection in the current application.

3. **Connection Parameters** If the application has not yet been connected to a database, or you have chosen to create a new connection in the previous step, the connection parameters page will be displayed.

1. First, select the required data provider from the **Provider** combo box. The Data Access library supports more than a dozen different data providers, including MS SQL Server, MS Access Database, Oracle and MySQL.
2. The other settings on this page depend on which data provider is used. Typically, you will need to specify the server name or the path to the database file, the user credentials, and the database name.
3. Finally, specify the name of the new connection in the **Connection name** field and click **Next**.

4. **Finish** On the last page, you can select a table or a view. The data from the selected table or view will be used in your application.

    1. Click **Finish** to close the wizard. Optionally, you can run the **Query Designer**, which will help you populate the new data source with data. To do this, check the **Open Query Designer after closing the wizard** check box before finishing.

Creating a data source in OLAP mode

Connect to an OLAP Server

To bind to an OLAP cube in a Microsoft SQL Server Analysis Services database, do the following.

1. On the first page, enter the data source name and click **Next**.
2. On the next page, select **Microsoft SQL Server Analysis Services** from the **Provider** combo box.

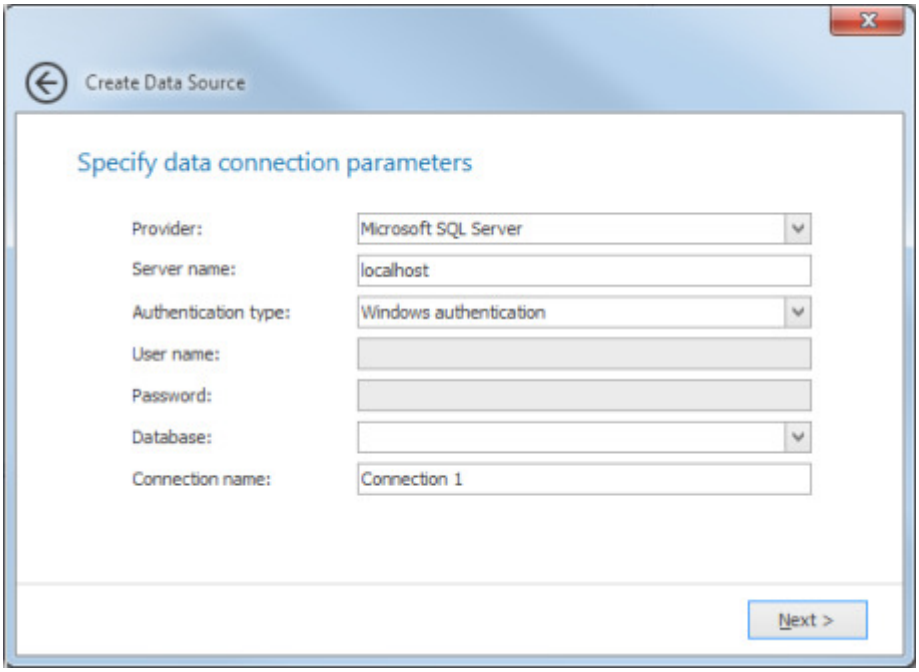
    1. Specify the server name and user credentials, and select the catalog and cube name.
    2. Next, specify the name of the new connection in the **Connection name** field and click **Next**.

3. On the last page, click **Finish**.

Composing a data source

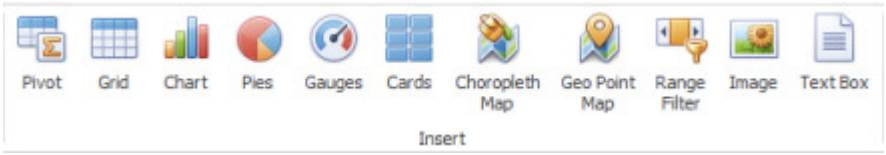
InLoox PM Dashboard provides the Windows Forms control that can solely constitute a comprehensive designer application.

The Dashboard Designer provides an easy-to-use wizard that helps you configure a connection to the database.



After the connection has been established, use the Query Designer to select data that will be used in the dashboard.

Designing dashboard items

1. To populate the dashboard with charts, pies, gauges and other elements, just click the desired data items in the Ribbon.
2. 

3. Drag-and-drop data that you wish to display within each item into a **Data items** area.
4. Now the dashboard is ready.

Providing data

The topics in this section describe how to provide the data to be visualized in the dashboard.

This section contains the following topics.

Data source filtering

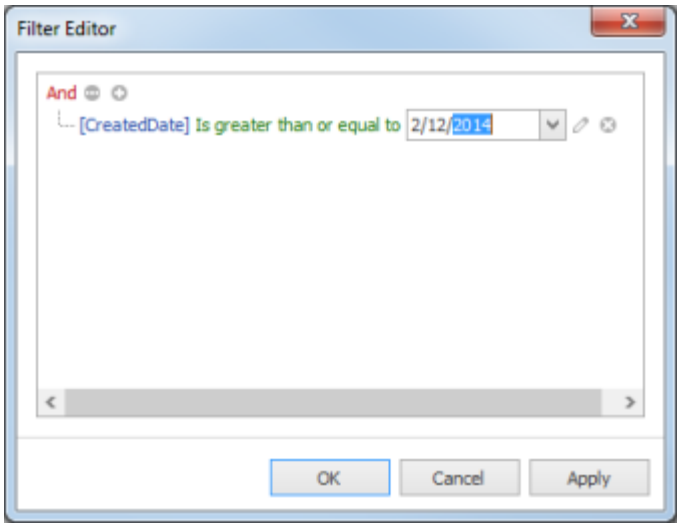
Calculated fields

Data source filtering

Apply filtering

To apply filtering to a data source, click the **Filter** button in the **Data Source** tab.

This will invoke the **Filter Editor** dialog, which allows you to build filter criteria.



To clear the data source filter, use the **Clear Filter** button in the **Data Source** tab.

Passing Parameter Values

You can use the **Filter Editor** to filter a data source according to the current parameter value.

Filtering Limitations

The limitations of a data source filter are as follows.

1. Fitering cannot be applied to a data source created in SQL View. You need to include the required conditions to the WHERE clause when editing a data source.
2. OLAP data sources do not support filtering.

Calculated fields

This document describes how to add calculated fields to a dashboard data source. Calculated fields allow you to apply complex expressions to data fields that are obtained from the dashboard's data source.

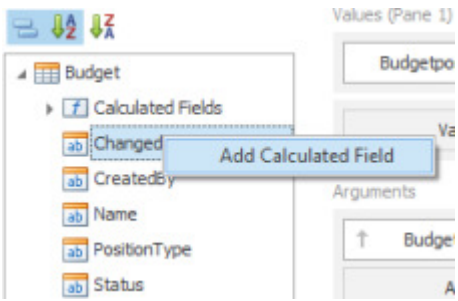
Creating a calculated field

Editing a calculated field

Creating a calculated field

After you have created a data source using the Create data source wizard, you can add a new calculated field based on the existing data source fields.

1. To create a calculated field, select the required data source in the **Data Source Browser** and click the **Add Calculated Field** button in the Ribbon's Data Source tab.
   Or right-click the **Data Source Browser** area and select **Add Calculated Field** in the context menu.



2. This invokes the **Expression Editor** dialog, which allows you to specify an expression that will be used to obtain calculated field values. Here you can construct the required expression.
3. After the expression has been specified, click **OK**. This displays a new calculated field in the data source structure.
4. Now you can specify the required calculated field type, change its default name, etc.

Editing a calculated field

To edit a calculated field, use its context menu.

This menu contains the following items.

Item	Description
Edit Expression	Invokes the Expression Editor dialog, which allows you to change an expression for an existing calculated field.
Field Type	Specifies the type of the calculated field.

Rename	Changes the calculated field name.
Delete	Removes the existing calculated field from the data source.

Using dashboard parameters

You can use **dashboard parameters** when it is necessary to pass data of a certain type to a dashboard (e.g., to pass a specific value to the data source filter string or a calculated field).

The topics in this section describe how to use dashboard parameters.

Creating parameters

Passing parameter values

Providing a user interface for requesting parameter values

Creating parameters

This topic explains how to create a new dashboard parameter and specify its settings.

To create dashboard parameters in the Dashboard Designer, do the following.

1. Click the **Parameters** button on the Ribbon's Data Source tab.
2. In the invoked dialog, click the **Add** button to add a new parameter.
3. Specify the following settings:

Settings	Description	API
Name	Specifies a parameter name.	Parameter.Name
Value	Specifies a parameter value.	Parameter.Value
Type	Specifies the parameter's type.	Parameter.Type
LookUpSettings	Specifies the parameter’s look-up editor settings.	DashboardParameter.LookUpSettings

Description	Specifies the parameter's description displayed to an end-user.	DashboardParameter.Description
Visible	Specifies whether a parameter's editor is visible within the Dashboard Parameters dialog.	DashboardParameter.Visible

Then, click **OK**, to include the created parameters in the dashboard.

Look-up editor settings

There are three types of look-up editor settings that can be specified for a parameter. Select the required type from the **LookUpSettings** drop-down list.

- No Look-Up - set the **Value** to use a static value as a parameter.
- Static List - click the ellipsis button to add static values for the current dashboard parameter. In this case, the **Value** specifies the default parameter's value.
- Dynamic List - allows you to use a list of values from the existing data source as a parameter. You need to select the required **DataSource** from the list of available data sources and data members for the dashboard parameter's display name and value, respectively.
  In this case, the **Value** specifies the default parameter's value.

Passing parameter values

In this topic, you will learn how to pass parameter values to a dashboard.

Filtering

You can filter a data source or apply filtering to a specific dashboard item according to the current parameter value using the Filter Editor.

In the Filter Editor, you can compare a field value with the following objects.

- A static value (represented by the icon). Click this button to switch to the next item mode ("another field value"), to compare the field value with another field value.
- Another field value (represented by the icon). Click this button to switch to the next item mode (“parameter value”), to compare the field value with a parameter value.

- A parameter value (represented by the icon). Click this button to switch back to the initial mode ("static value"), to compare the field value with a static value.

Thus, to compare a field value with a parameter value, click the button, then click the button.

Calculated Fields

You can use parameters when constructing expressions for calculated fields. A parameter is inserted into the expression using the "**Parameters.**" prefix.

To see a list of available parameters, click **Parameters** in the **Expression Editor** dialog.

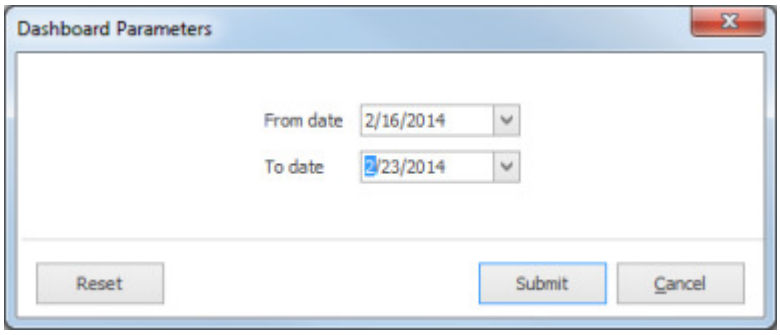
Custom SQL Queries

You can include parameters in a data source custom SQL query in the Query Designer. To do this, use the parameter name. For instance, you can include a parameter to a WHERE clause or to a stored procedure.

Providing a user interface for requesting parameter values

The dashboard provides a built-in **Dashboard Parameters** dialog, which provides the capability to change dashboard parameter values. This dialog is created automatically, depending on the parameter type and visibility settings.

1. To invoke the **Dashboard Parameters** dialog in the **DashboardViewer**, click the **Parameters** button in the dashboard title. Depending on the dashboard parameters enabled, this invokes the following dialog.
   This will invoke the following **Dashboard Parameters** dialog.



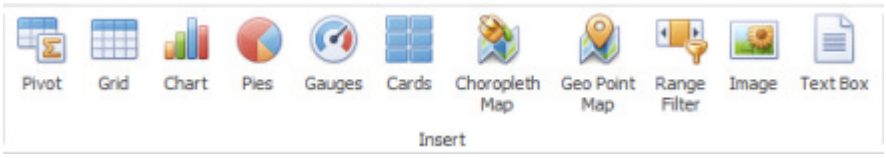
2. Select the required parameter values in the **Dashboard Parameters** dialog and click the **Submit** button to apply the changes.
3. To reset changes to the default values, click the **Reset** button.

Creating dashboard items

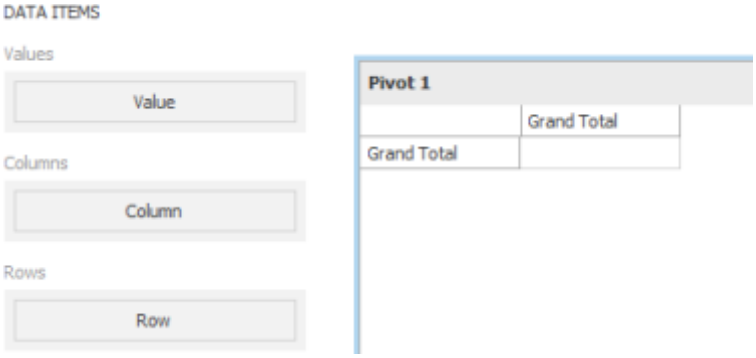
Dashboard items represent elements from the Ribbon used to visualize data within the Dashboard in various ways.

Adding dashboard items

To create a dashboard item in the Dashboard Designer, click the corresponding button in the Ribbon.



This creates an empty dashboard item and displays required data sections to bind this item to data.



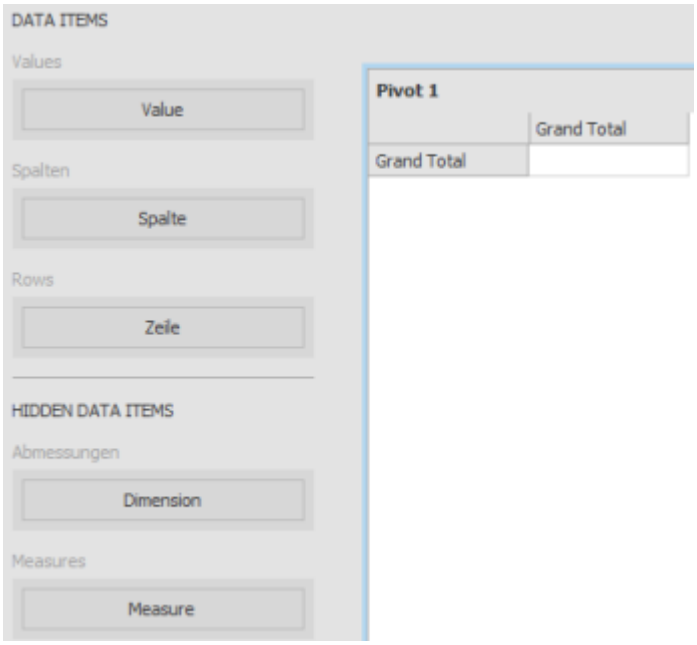
This section describes the available dashboard items.

- Pivot
- Grid
- Chart
- Pies
- Gauges
- Cards
- Choropleth map
- Geo point map
- Range filter
- Image
- Text box

Pivot

The **Pivot** dashboard item displays a cross-tabular report that presents multi-dimensional data in an easy-to-read format.

Data sections in the pivot



Values the section contains data items used to calculate values displayed in the pivot table.

Columns the section contains data items whose values are used to label columns.

Rows the section contains data items whose values are used to label rows.

Layout

If the **Columns** section or **Rows** section contains several data items, the pivot table column and row headers are arranged in a hierarchy, and make up column and row groups.

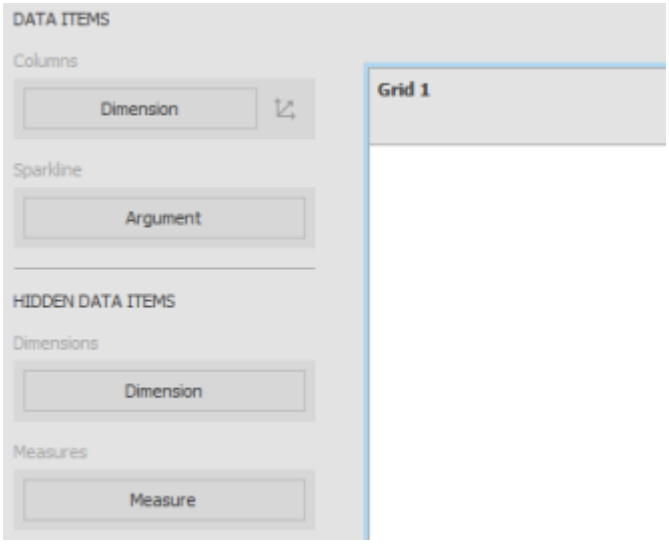
Use the **Initial State** button in the **Data** tab to open or close the groups.

This button invokes the popup menu that allows you to select whether column and row groups should be collapsed or expanded by default in a Dashboard Viewer.

Grid

This section describes the features available in the **Grid** dashboard item, and provides extensive information about data items and how to customize grids.

Data sections in the grid



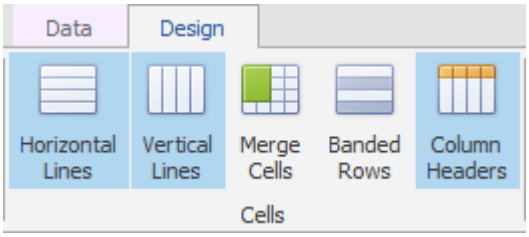
The grid has **Columns** and **Sparkline** data sections, which are used to provide data items based on the columns that are created.

Sparkline column visualizes the variation of summary values over time.

Layout

The **Grid** dashboard item allows you to introduce cell merging and banded rows, and specify the visibility of column headers and grid lines.

To do this, use the **Design** Ribbon tab.



The **Horizontal Lines** and **Vertical Lines** buttons control grid line visibility. Use the **Column Headers** button to toggle column header visibility.

You can also enable the Grid to merge adjacent cells with identical data. To do this, use the **Merge Cells** button.

To paint the background of odd and even rows differently, use the **Banded Rows** button.

NOTE Note that banded rows are not available when cell merging is enabled.

Master filtering

The **Grid** dashboard item supports filtering by rows. When Master Filtering is enabled, an end-user can click a grid row (or multiple rows by holding down the **CTRL** key) to make other dashboard items only display data related to the selected record(s).

TIP To learn how to enable Master Filtering in the Designer, see Master filtering.

Drill-Down

The built-in drill-down capability allows end-users to change the detail level of data displayed in dashboard items on the fly.

TIP To learn more, see Drill-Down.

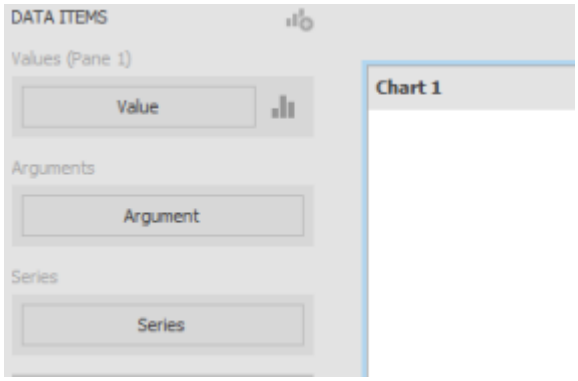
The Grid dashboard item supports drill-down for rows. When drill-down is enabled, an end-user can click a grid row to view the details.

Drill-down requires that the **Columns** section contains several dimensions at the top, from the least detailed to the most detailed dimension.

NOTE In OLAP mode, you can perform drill-down for either a hierarchy data item or several dimension attributes.

Chart

Data sections in the chart



Values the section contains data items against which the Y-coordinates of data points are calculated.

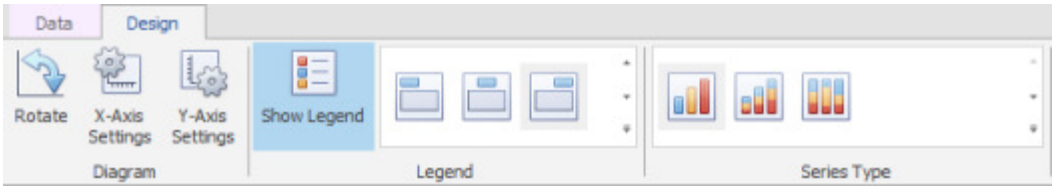
Arguments the section contains data items that provide values displayed along the X-axis of the chart.

Series the section contains data items whose values are used to create chart series.

Layout

This section describes the features available in the **Chart** dashboard item, and provide extensive information on how to customize charts.

All buttons are displayed on the **Design** tab.



- You can rotate the Chart so that the X-axis becomes vertical, and the Y-axis becomes horizontal. Use he **Rotate** button in the **Diagram** group.
- The Chart dashboard item displays two axes by default: the X-axis and the Y-axis. The X-axis is the axis of arguments. The Y-axis is the numerical axis of values.
    - Click **X-Axis Settings** to invoke the **X-Axis Settings** dialog. The setting **Show X-axis** allows you to hide and show the X-axis. The setting **Show title** allows you to hide and show the X-axis title. You can choose whether to use the default text or specify a custom string.
    - If the dimension in the Arguments section contains numeric data, the Chart can create either a continuous X-axis or a discrete X-axis. Specify the needed type in the contaxt menu for the argument on the **Data Item** pane.
    - Click **Y-Axis Settings** to invoke the Y-Axis Settings dialog. The dialog contains the following settings:
        - **Show grid lines** Allows you to hide and show grid lines for the Y-axis.
        - **Show Y-axis** Allows you to hide and show the Y-axis.
        - **Always show zero level** Specifies whether or not the axis' zero level is visible. If this option is unchecked, the visible axis range is defined based on the values plotted in the chart.
        - **Show title** Allows you to hide and show the Y-axis title. You can choose whether to use the default text or specify a custom string.
- A **Legend** is an element of a chart that identifies its series. You can specify whether or not a chart should display a legend. In the Designer, use the **Show Legend** button in the **Legend** group.
    - To specify the legend's position and orientation, select one of the predefined options from the gallery in the **Design** Ribbon tab.

- The **Chart** dashboard item supports different types of series - from simple bar and line charts to candle stick and bubble graphs. To switch between series types in the Designer do one of the following
    - Click an options button near a required data item (or a placeholder) in the **Values** section. In the invoked **Series Type** dialog, select a required series type and click **OK**.
    - Use the **Series Type** gallery in the **Design** Ribbon tab.

Master Filtering

Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

TIP To learn more, see the Master filtering topic that describes filtering concepts common to all dashboard items.

The **Chart** dashboard item supports filtering by **argument** or **series** values.

- When filtering by arguments is enabled, an end-user can click series points to make other dashboard items display only data related to selected argument values. Click the **Arguments** button in the **Data** Ribbon tab.
- When filtering by series is enabled, an end-user can click a series point to make other dashboard items display only data related to the selected series. Click the **Series** button in the **Data** Ribbon tab.

Drill-Down

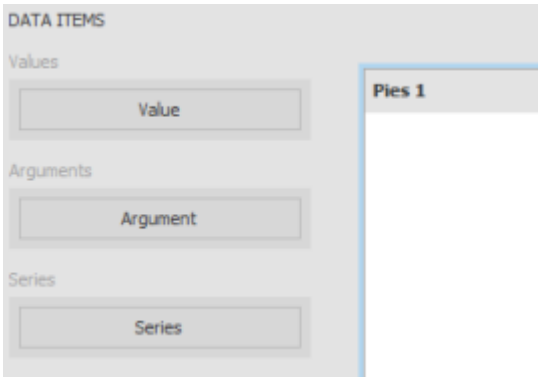
The built-in drill-down capability allows end-users to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

The Chart dashboard item supports drill-down on argument or series values.

- When drill-down on arguments is enabled, an end-user can click a series point to view a detail chart for the corresponding argument value. Drill-down on arguments requires that the Arguments section contains several data items, from the least detailed to the most detailed item. Click **Arguments** in the **Data** Ribbon tab.
- When drill-down on series is enabled, an end-user can click a series point (or corresponding legend item) to view a detail chart for the corresponding series. Drill-down on series requires that the Series section contains several data items, from the least detailed to the most detailed item. Click **Series** in the **Data** Ribbon tab.

Pies

Data sections in the pies



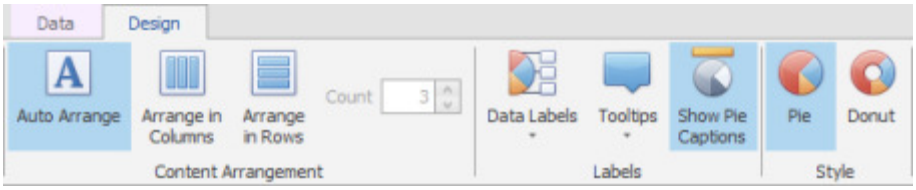
Values the section contains data items that define the share of pie segments.

Arguments the section contains data items that provide values used to label pie segments.

Series the section contains data items whose values are used to label pie charts.

Layout

All buttons for customizing the dashboard item **Pies** are on the **Design** tab.



- To control how pies are arranged, use the **Content Arrangement** group in the **Design** Ribbon tab.
  - By default, the **Auto Arrange** option is enabled, which automatically resizes pies to fit within the dashboard item.
  - You can also specify the number of columns in which pies are arranged. Click the **Arrange in Columns** button and specify the appropriate number in the **Count** field.
  - Similarly, you can arrange pies in a specific number of rows.
- Pies display **data labels** that contain descriptions for pie segments, and provide **tooltips** with additional information.
  - You can specify which information should be displayed within data labels and tooltips. To do this, use the **Data Labels** and **Tooltips** buttons in the **Design** Ribbon tab. These buttons

invoke the drop-down menu, which is similar for both buttons. This menu allows you to specify which values are displayed within data labels or tooltips.

  - Define the visibility of the pie caption via the Show Pie Captions button.

- Select the diagram style, use the **Pie** and **Donut** buttons in the **Style** group of the **Design** Ribbon tab.

Master Filtering

Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

TIP To learn more, see the Master filtering topic that describes filtering concepts common to all dashboard items.

The **Pie** dashboard item supports filtering by **argument** or **series** values.

- When filtering by arguments is enabled, an end-user can click a pie segment to make other dashboard items display only data related to selected argument values. Click the **Arguments** button in the **Data** Ribbon tab.
- When filtering by series is enabled, an end-user can click a pie to make other dashboard items display only data related to the selected pie. Click the **Series** button in the **Data** Ribbon tab.

Drill-Down

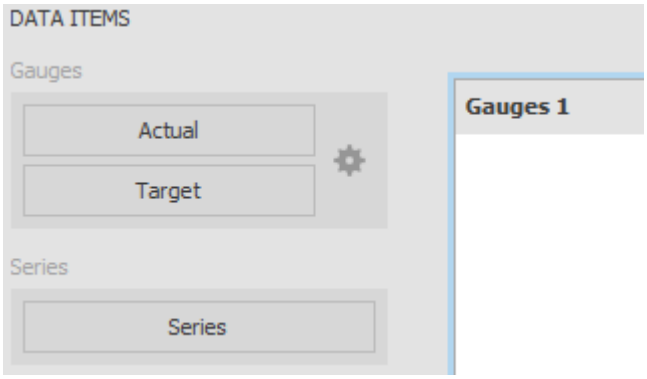
The built-in drill-down capability allows end-users to change the detail level of data displayed in dashboard items on the fly. To learn more, see Drill-Down.

The **Pie** dashboard item supports drill-down on **argument** or **series** values.

- When drill-down on arguments is enabled, an end-user can click a pie segment to view a detail chart for the corresponding argument value. Drill-down on arguments requires that the Arguments section contains several data items, from the least detailed to the most detailed item. Click **Arguments** in the **Data** Ribbon tab.
- When drill-down on series is enabled, an end-user can click a pie to view a detail chart for the corresponding series. Drill-down on series requires that the Series section contains several data items, from the least detailed to the most detailed item. Click **Series** in the **Data** Ribbon tab.

Gauges

Data sections in the gauges



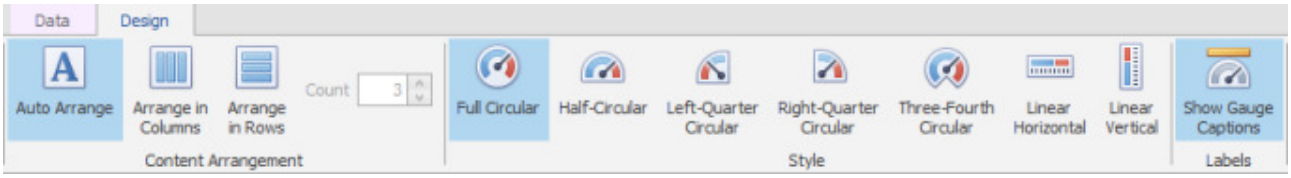
Gauges the section contains data items used to calculate values displayed by gauges.

Data items are arranged in containers. Each **data item container** can hold two data items. The first item contains *actual* data and the second item (optional) contains *target* data. If both items are provided, gauges show the difference between actual and target values.

Series the section contains data items whose values are used to label gauges.

Layout

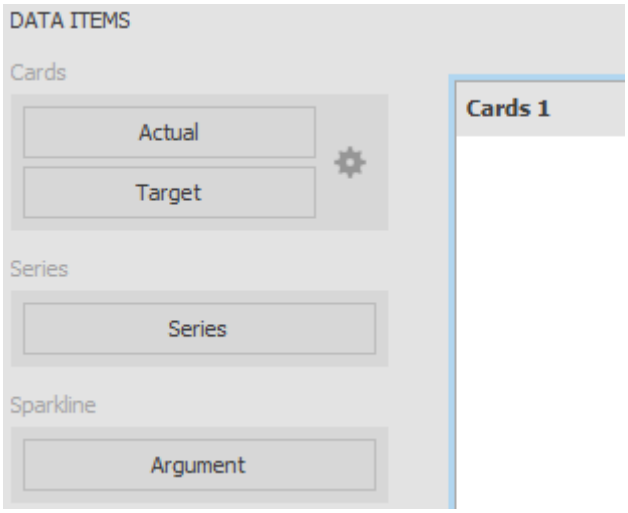
All buttons for customizing are on the Design tab.



- To control how gauges are arranged, use the **Content Arrangement** group in the **Design** Ribbon tab.
    - By default, the **Auto Arrange** option is enabled, which automatically resizes gauges to fit within the dashboard item.
    - You can also specify the number of columns in which gauges are arranged. Click the **Arrange in Columns** button and specify the appropriate number in the **Count** field.
    - Similarly, you can arrange gauges in a specific number of rows.
- The Gauge dashboard item allows you to select the gauge type: Full Circular, Half-Circular, Left-Quarter Circular, Right-Quarter Circular, Three-Fourths Circular, Linear Horizontal and Linear Vertical.

Cards

Data sections in the cards



Cards the section contains data items used to calculate values displayed within cards.

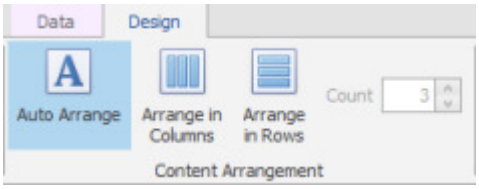
Data items are arranged in containers. Each **data item container** can hold two data items. The first item contains *actual* data and the second item (optional) contains *target* data. If both items are provided, cards show the difference between actual and target values.

Series the section contains data items whose values are used to label cards.

Sparkline the section is used to provide a date-time dimension whose data will be used to visualize values using sparklines.

Layout

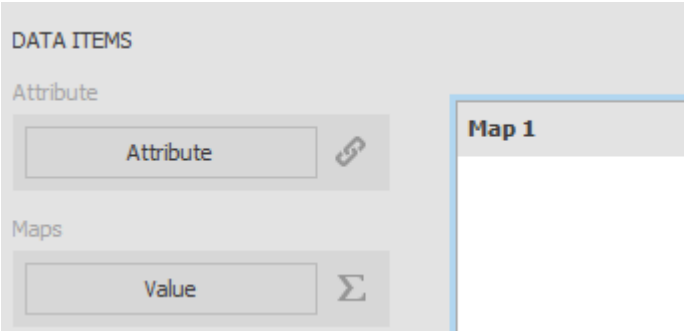
To control how cards are arranged, use the **Content Arrangement** group in the **Design** Ribbon tab.



- By default, the **Auto Arrange** option is enabled, which automatically resizes cards to fit within the dashboard item.
- You can also specify the number of columns in which cards are arranged. Click the **Arrange in Columns** button and specify the appropriate number in the **Count** field.
- Similarly, you can arrange cards in a specific number of rows.

Choropleth map

Data sections in the Choropleth Map

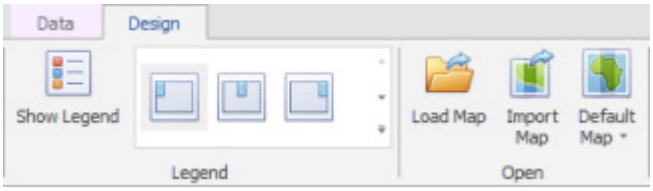


Attribute the data section contains the **Attribute** data item, which allows you to associate map shapes with data source field values.

Maps data section contains data items whose values are used to color map shapes. Map shape colors vary based on the map type.

Layout

Alle buttons for customizing the dashboard item are on the Design tab.



A **Legend** is an element of a chart that identifies its series. You can specify whether or not a chart should display a legend. In the Designer, use the **Show Legend** button in the **Legend** group.

To specify the legend's position and orientation, select one of the predefined options from the gallery in the **Design** Ribbon tab.

Providing maps

Dashboard ships with a set of default maps showing various parts of the world. The following maps are included.

- **World Countries** - a world map.
- **Europe** - a map of Europe.

- Asia - a map of Asia.
- North America - a map of North America.
- South America - a map of South America.
- Africa - a map of Africa.
- USA - a map of the USA.
- Canada - a map of Canada.

As an alternative, use the corresponding command in the map context menu.

Dashboard uses a **Shapefile** vector format to provide custom maps. Commonly, this format includes two file types. To open an existing shapefile, use the **Load Map** or **Import Map** button in the Ribbon. In the invoked dialog, locate the required **.shp** file.

Map attributes

After you select the default map or a custom map, you can view supplemental information (such as the name of the country, state, etc.). To do this, click the **Options** button next to the **Attribute** data item.

In the invoked **Map Attribute Binding** dialog, click **Preview**. The table in the dialog displays the available attributes for the current map. Each set of attribute values is related to a specific map shape.

Map coloring

The **Choropleth Map** dashboard item colors map shapes depending on the provided values.

The **Choropleth Map** automatically selects palette and scale settings to color map shapes.

If you need to customize these settings, click the **Options** button next to the data item that contains these values. This invokes the **Choropleth Map Options** dialog.

You can specify the following settings in this window.

- Color palette - allows you to specify the start and end color of the palette.
- Scale settings - specifies whether a *percent* scale or an *absolute* scale is used to define a set of colors. You can specify the number of levels that represent the number of colors used to color the map.
- Preview is used to display a full set of palette colors generated based on the start/end colors and the number of levels. Use the Allow Edit check box to automatically change the generated colors or specify value ranges for each color.

Delta

The **Choropleth Map** allows you to indicate the difference between the actual and target values of a particular parameter. This difference is called **delta**.

To specify delta indication settings, click the **Options** button next to the data item container.

This invokes the **Choropleth Map Options** dialog. When the map type is set to **Delta**, this dialog contains the following settings.

- **Value type** You can specify which values to display within map tooltips. Use the Value type combo box to select the value that will be displayed as the delta value.
- **Result Indication** You can specify the condition that will be used to select the indicator color. To do this, use the Result indication combo box.
- **Threshold type** and **Threshold value** You can specify that a required indicator should only be displayed when the difference between the actual and target values exceeds a specified value.

Master Filtering

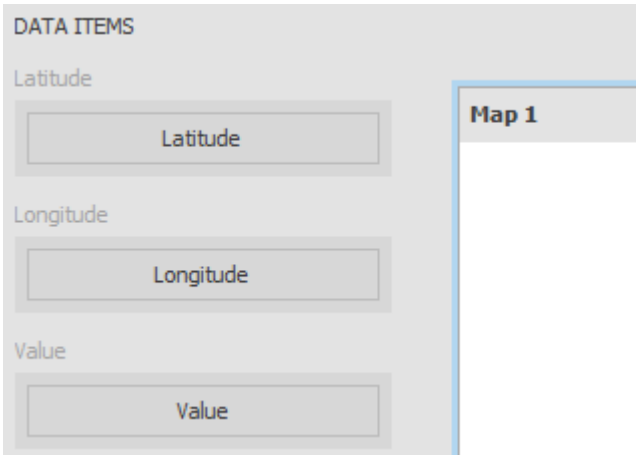
Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

TIP To learn more, see the Master filtering topic that describes filtering concepts common to all dashboard items.

When filtering is enabled, an end-user can click a shape (or multiple shapes by holding down the **CTRL** key) to make other dashboard items display only data related to selected shape(s).

Geo point map

Data sections in the Geo Point Map



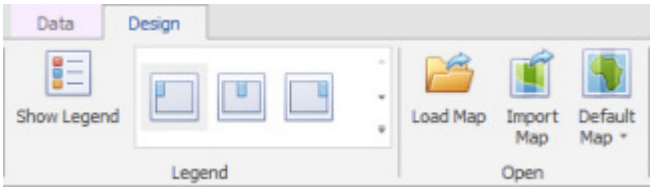
Latitude the data section accepts geographic latitude points.

Longitude the data section accepts geographic longitude points.

Value the data section accepts values related to geographic points.

Layout

Alle buttons for customizing the dashboard item are on the Design tab.



Dashboard ships with a set of default maps showing various parts of the world. The following maps are included.

- World Countries - a world map.
- Europe - a map of Europe.
- Asia - a map of Asia.
- North America - a map of North America.
- South America - a map of South America.
- Africa - a map of Africa.

- USA - a map of the USA.
- Canada - a map of Canada.

Dashboard uses a **Shapefile** vector format to provide custom maps. Commonly, this format includes two file types. To open an existing shapefile, use the **Load Map** or **Import Map** button in the Ribbon. In the invoked dialog, locate the required **.shp** file.

Master Filtering

Dashboard allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**).

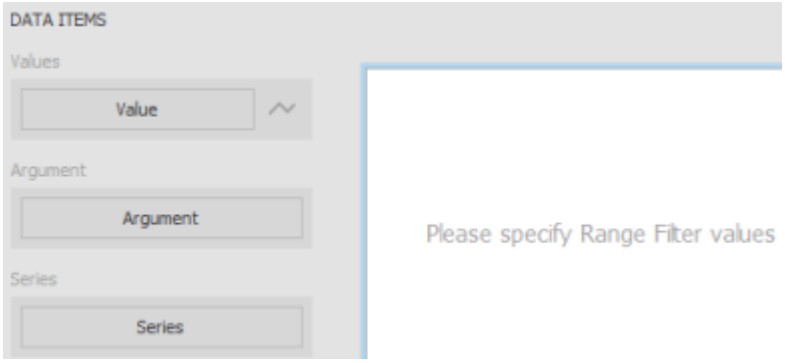
TIP To learn more, see the Master filtering topic that describes filtering concepts common to all dashboard items.

When filtering is enabled, an end-user can click a callout (or multiple a callouts by holding down the **CTRL** key) to make other dashboard items display only data related to selected a callout(s).

Range filter

The **Range Filter** dashboard item allows you to apply filtering to other dashboard items. This item displays a chart with selection thumbs that allow you to filter out values displayed along the argument axis.

Data sections in the Range Filter



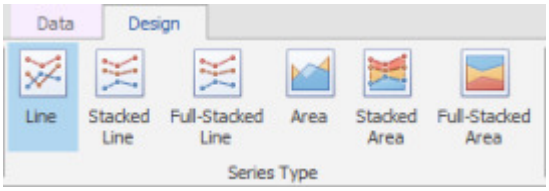
Values the section contains data items against which the Y-coordinates of data points are calculated.

Arguments the section contains data items that provide values displayed along the horizontal axis of the Range Filter. Filtering is performed based on these values.

Series the section contains data items whose values are used to create chart series.

Layout

The Range Filter dashboard item supports various Line and Area series types.



To switch between series types in the Designer do one of the following.

- Use the **Series Type** group in the **Design** Ribbon tab.
- Click the options button next to the required data item in the **Values** section. In the invoked **Series Type** dialog, select the required series type and click **OK**.

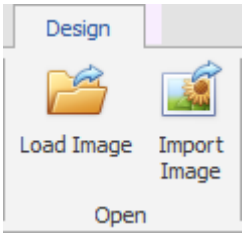
The Range Filter supports the following series types: Line, Stacked Line, Full-Stacked Line, Area, Stacked Area and Full-Stacked Area.

Image

Use the **Image** dashboard item to add static images to a dashboard.

Loading an image

To load an image into a dashboard item, use the **Load Image** and **Import Image** buttons in the Ribbon. or commands in the context menu (**Load Image...** and **Import Image...**, respectively).



These commands invoke the **Open** dialog, which allows you to locate the desired image.

The **Load Image** command saves the path to the image in the dashboard definition, while the **Import Image** command saves the image itself.

Image alignment

To specify how the image is aligned within the dashboard item, use the **Alignment** group in the Ribbon's **Design** tab.

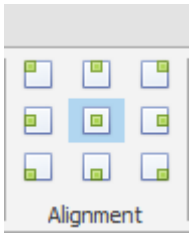
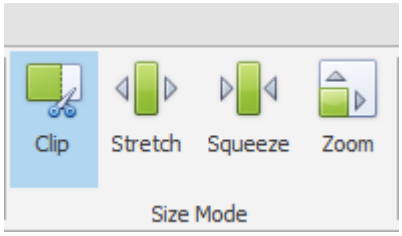


Image size mode

You can specify the image size mode that defines how the image fits within the dashboard item.

To do this, use the **Size Mode** group in the Ribbon's **Design** tab.



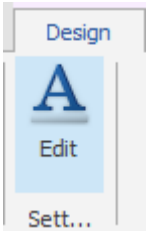
The following table illustrates each size mode in two cases: when the image is smaller than the dashboard item, and vice versa.

Clip	**The image is clipped if it is larger than the image dashboard item.**
Stretch	The image within the image dashboard item is stretched or shrunk to fit the size of the image dashboard item.
Squeeze	If the dimensions of the image dashboard item exceed those of the image it contains, the image is shown full-size. Otherwise, the image is resized to fit the dimensions of the image dashboard item.
Zoom	The image is sized proportionally (without clipping), so that it best fits the image dashboard item. If the aspect ratio of the image dashboard item is the same as the aspect ratio of the image, it will be resized to fit into the image dashboard item while maintaining its aspect ratio. Otherwise, the closest fitting side of the image (either the height or the width) will be sized to fit the dashboard item, and the remaining side (height or width) will be sized proportionally (leaving empty space).

Text box

Use the **Text Box** dashboard item to display rich text within a dashboard.

Editing text



To edit text within the text box, click the **Edit** button in the Ribbon's **Design** tab, the corresponding item in the context menu, or double-click the Text Box dashboard item.

dashboard item to display rich text within a dashboard.

This invokes the **Edit Text** window in which you can edit the text content and customize its formatting.

Binding dashboard items to data

Dashboard items must be bound to data source fields to display data.

Each kind of dashboard item has a specific set of **data sections** such as **Values**, **Arguments** and **Series** in the chart, **Columns** in the grid, and **Values**, **Columns** and **Rows** in the pivot grid. Each data section corresponds to a particular dashboard item area or element, and should be mapped to data to be displayed within this area/element.

Mapping is performed using special objects called **data items**. A data item identifies data binding. When created, a data item is mapped to a data source field, and is then assigned to a specific dashboard item's data section. As a result, the dashboard item is bound to the data source field.

This section consists of the following topics.

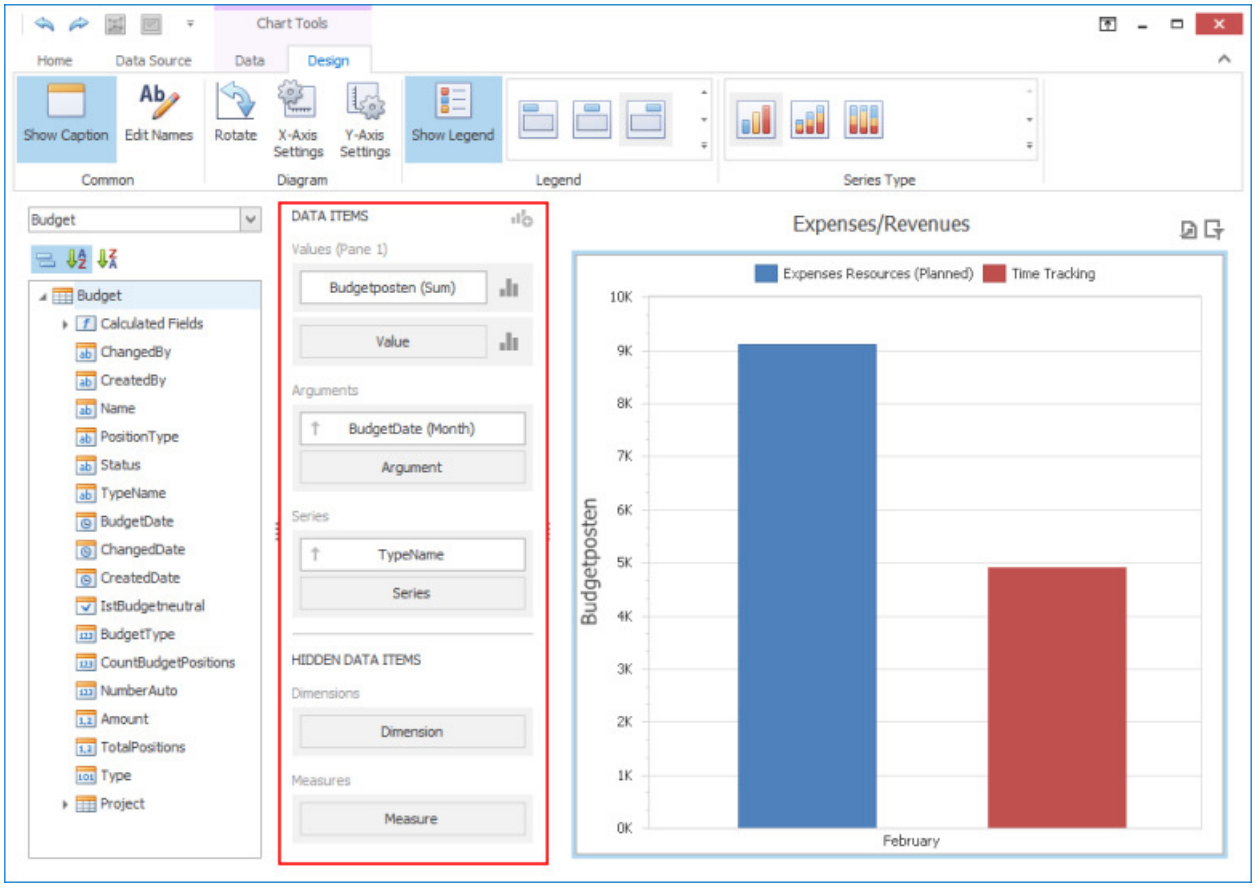
Binding dashboard items to data in the designer

Hidden data items

Binding dashboard items to data in OLAP mode

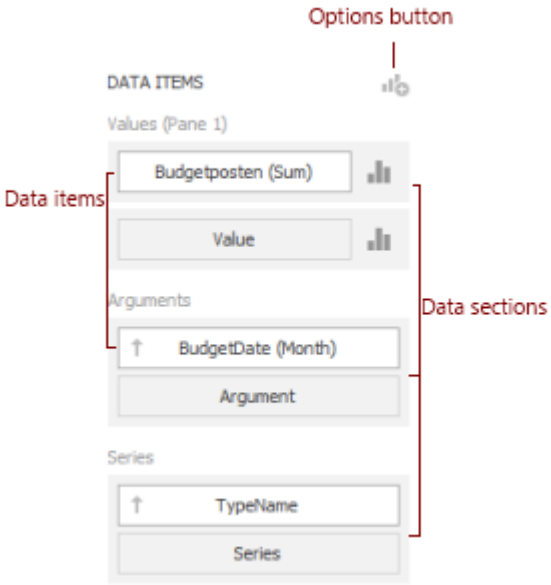
Binding dashboard items to data in the designer

To bind dashboard items to data in the Dashboard Designer, use the **Data Items** pane.

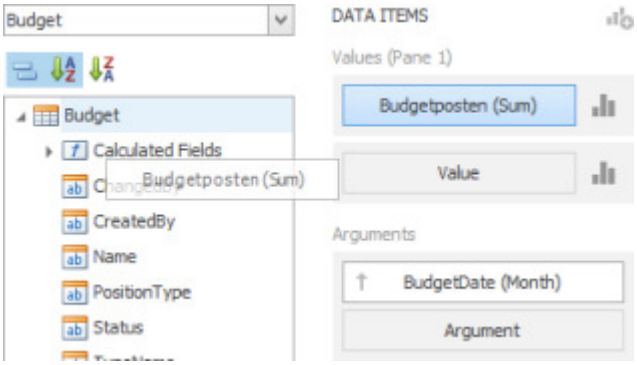


This pane displays data sections of the selected dashboard item and can be used to add, rearrange and remove data items.

Specific data sections display **options buttons** for each data item. Use these buttons to invoke a dialog that allows you to customize the settings of this data item.

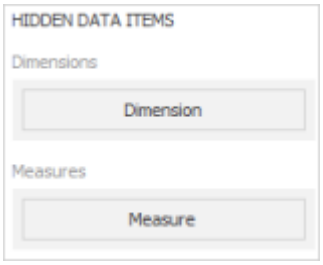


To bind a dashboard item to data, select the dashboard item. Then choose the required data member from the **Data Source Browser** and drop it onto the appropriate section in the DATA ITEMS pane.



Hidden data items

The **Hidden data items** area was designed to perform data shaping operations by measures or dimensions that do not directly take part in the visual representation of data.



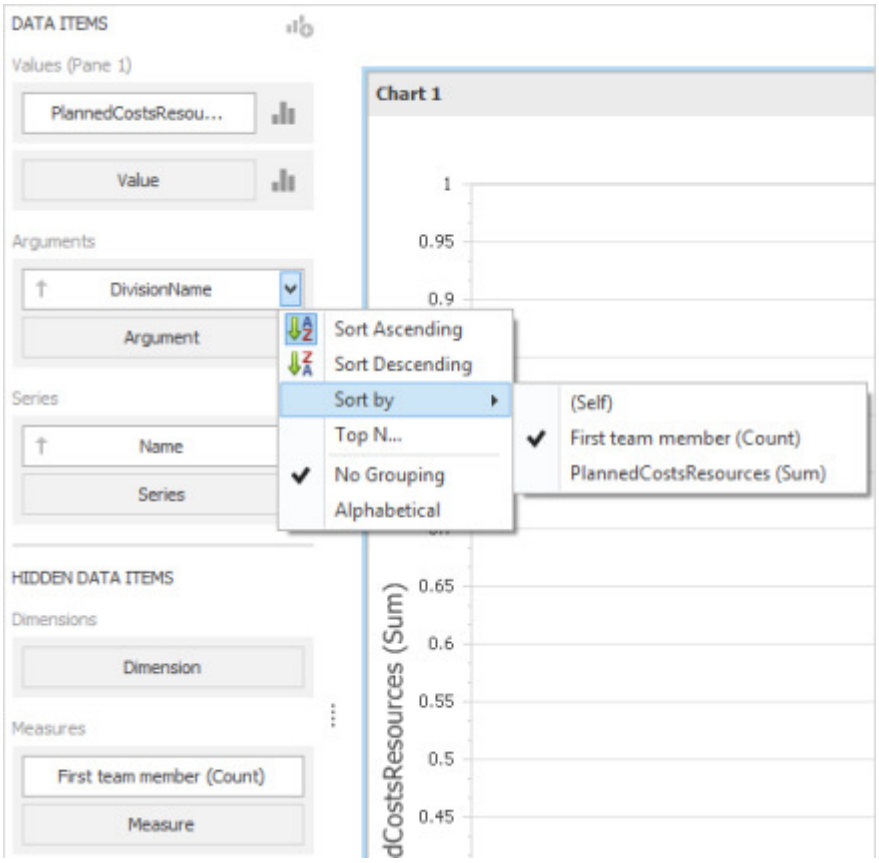
The **Dimension** class represents a data item whose values are not intended to be summarized. The dashboard would not summarize the dimension values but process each one individually.This means that dimension values are eligible for sorting or grouping.

The **Measure** class represents a data item whose values are summarized before they are used in the dashboard. The dashboard will calculate an appropriate summary function against measure values. For instance, measures are used to provide data for the chart's Y-axis.

Assume that you have a dashboard containing a chart that shows the planned resource costs in a company by department.

Now imagine that you need to sort departments by the team members. To do this, you will need to add the **First team member** measure to the Chart so that its data is not displayed, but only used for sorting.

Drag-and-drop the **First team member** data field onto the **Measures** section in the **Hidden data items** area. This will create the **First team member (Count)** measure, which will be available in the **Sort by** menu.



Note that the Hidden data items area is divided into two sections: **Dimensions** and **Measures**.

TIPS

- Hidden dimensions appear in the **Filter Editor** dialog, allowing you to create filter criteria based on their values. For more information see Filtering.
- Hidden measures appear in the **Sort by** submenu (to sort dimension values by them), and in the Top N Values dialog (to use them in Top N conditions).

Binding dashboard items to data in OLAP mode

In OLAP mode, the cube schema is fetched automatically, and the **Data Source Browser** displays the entire OLAP cube structure.

To visualize data, drag-and-drop measures, attributes or hierarchies to the appropriate data sections in the **DATA ITEMS** area, as described in the Binding dashboard items to data in the designer topic.

Note that OLAP measures can only be placed in the **Values** section, while dimension attributes and hierarchies can be placed within other data sections.

OLAP hierarchies allow you to customize each of their levels separately. To access hierarchy level options, invoke the data item menu for the hierarchy and then use the submenu that corresponds to the desired level.

Data shaping

This section describes how to perform various data shaping operations (such as grouping, sorting and filtering) in the Dashboard Designer.

The section contains the following topics.

Summarization

Grouping

Sorting

Filtering

Top N

Formatting data

Summarization

To obtain numeric values that should be displayed within a dashboard item, Dashboard calculates a summary function against the specified measure.

This topic describes how to specify which summary function should be calculated against a particular measure.

Summary function types

The following summary functions are available.

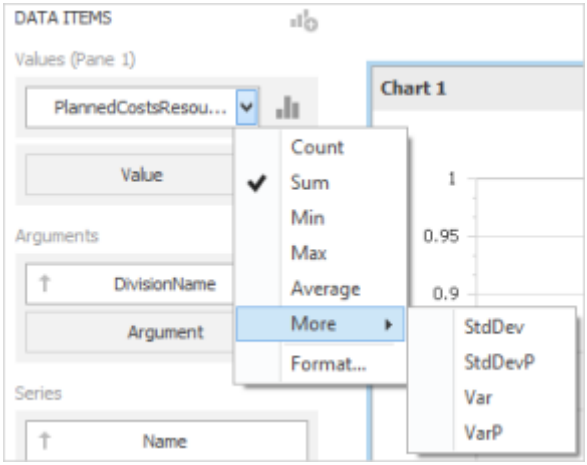
Count	The number of values (excluding Null and DBNull values). This is the only summary type that can be calculated against non-numeric data.
Sum	The sum of the values. $Sum = \sum_i v_i$

Min	The smallest value.
Max	The largest value.
Average	The average of the values. $\bar{v} = \frac{1}{n} \cdot \sum_i v_i$
StdDev	An estimate of the standard deviation of a population, where the sample is a subset of the entire population. $StdDev = \sqrt{\frac{1}{n-1} \cdot \sum_i (v_i - \bar{v})^2}$
StdDevP	The standard deviation of a population, where the population is the entire data to be summarized. $StdDevp = \sqrt{\frac{1}{n} \cdot \sum_i (v_i - \bar{v})^2}$
Var	An estimate of the variance of a population, where the sample is a subset of the entire population. $Var = \frac{1}{n-1} \cdot \sum_i (v_i - \bar{v})^2$
VarP	The variance of a population, where the population is the entire data to be summarized. $Varp = \frac{1}{n} \cdot \sum_i (v_i - \bar{v})^2$

Changing summary type

By default, Dashboard calculates **Sum** for numeric measures and **Count** for measures that contain another type of data.

You can change the summary function type for numeric measures. To do this in the Designer, invoke the data item menu and select the desired summary type. Less common summary types are organized in the **More** submenu.



Grouping

Dashboard allows you to group dimension values and display summaries for entire groups rather than individual values.

You can arrange dimension values in groups of different sizes by specifying the appropriate **group interval**. For instance, date-time values can be grouped by years, months, quarters, etc.

This topic lists the supported text and date-time group intervals, and describes how to change the group interval.

The following sections are available.

Text group intervals

String values support the following grouping intervals.

No grouping	Each value is displayed "as is".
Alphabetical	Values are grouped alphabetically. Example: A, B, C, ... Z

Date-time group intervals

Date-time values support the following group intervals.

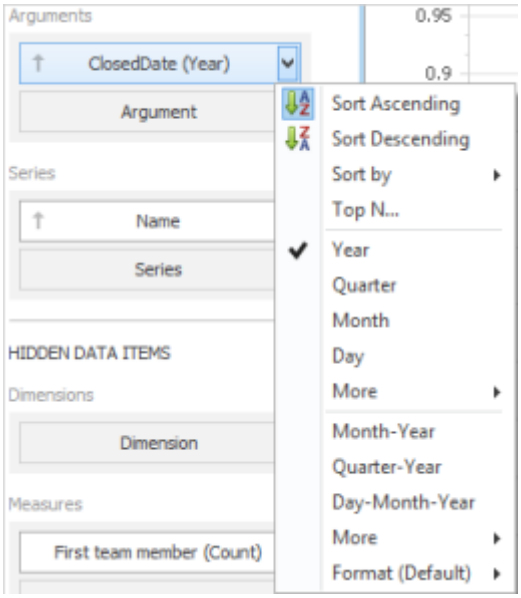
Year	Values are grouped by the year. Example: 2012, 2013, 2014

Quarter	Values are grouped by the quarter. Example: Q1, Q2, Q3, Q4
Month	Values are grouped by the month. Example: January, February, March, ... December
Day	Values are grouped by the day of the month. Example: 1, 2, 3, ... 31
Hour	Values are grouped by the hour. Example: 0, 1, 2, ... 23
Minute	Values are grouped by the minute. Example: 0, 1, 2, ... 59
Second	Values are grouped by the second. Example: 0, 1, 2, ... 59
Day of the Year	Values are grouped by the day of the year. Example: 1, 2, 3, ... 365 (366 in a leap year)
Day of the Week	Values are grouped by the day of the week. Example: Sunday, Monday, Tuesday, ... Saturday
Week of the Month	Values are grouped by the week of the month. Example: 1, 2, 3, 4, 5
Month-Year	Values are grouped by the year and month. Example: January 2012, February 2012, ... December 2012, January 2013, ...
Quarter-Year	Values are grouped by the year and quarter. Example: Q3 2013, Q4 2013, Q1 2014, Q2 2014, ...
Day-Month-Year	Values are grouped by date. Example: 3/4/2014, 3/5/2014, 3/6/2014, ...
Date-Hour	Values are grouped by date with the hour value. Example: 3/4/2014 0:00 AM, 3/4/2014 1:00 AM, 3/4/2014 2:00 AM, ...

Date-Hour-Minute	Values are grouped by date with the hour and minute values. Example: 3/4/2014 0:00 AM, 3/4/2014 0:01 AM, 3/4/2014 0:02 AM, ...
Date-Hour-Minute-Second	Values are grouped by date with the hour, minute and second values. Example: 3/4/2014 0:00:00 AM, 3/4/2014 0:00:01 AM, 3/4/2014 0:00:02 AM, ...

Changing group interval

To specify the group interval in the Designer, invoke the data item menu and select the desired group interval. Less common group intervals are organized in the **More** submenus.

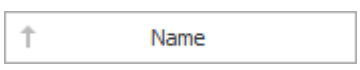


Sorting

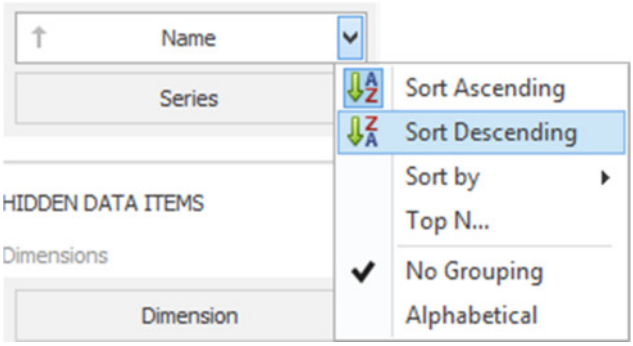
The Dashboard allows you to easily change the sort order of values within a dashboard item. You can also enable sorting by parameter values.

Changing Sort Order

The sort order of dimension values is indicated with an arrow.



To change the sort order in the Designer, click the data item. You can also toggle sorting from the data item menu.



Sorting by Parameter Values

Dashboard allows you to sort dimension values by a specific parameter represented by a measure.

To enable sorting by measure in the Designer, use the **Sort by** submenu in the dimension's menu.

Filtering

Dashboard allows you to apply filtering to each individual data-aware dashboard item.

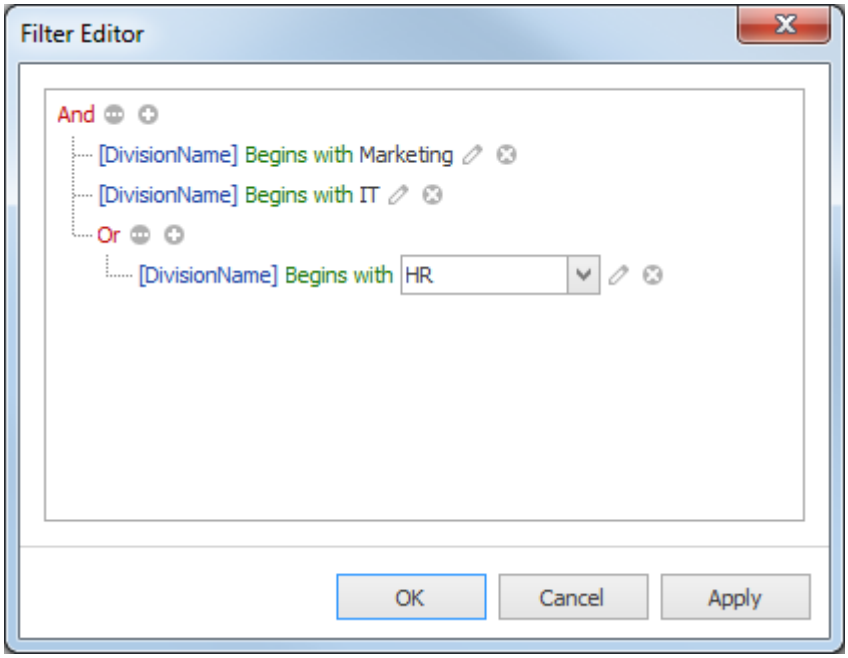
This topic describes how to enable and reset filtering.

Apply filtering

To configure filtering in the Designer, select the target dashboard item and do one of the following.

- Click the **Edit Filter** button in the **Data** tab.
- Right-click on a dashboard item and select **Edit Filter** from its context menu.

This will invoke the **Filter Editor** dialog. Use this dialog to build filter criteria with a convenient tree-like interface.



Clear filtering

To clear filtering in the Designer, select the target dashboard item and do one of the following.

- Click the **Clear** button in the **Data** tab.
- Right-click on a dashboard item and select **Clear** from its context menu.

OLAP filtering specifics

You cannot apply filtering by building complex filter criteria in OLAP mode. Instead, you can filter dimension attributes and hierarchies by manually selecting the values you wish (or do not wish) to include in the dashboard.

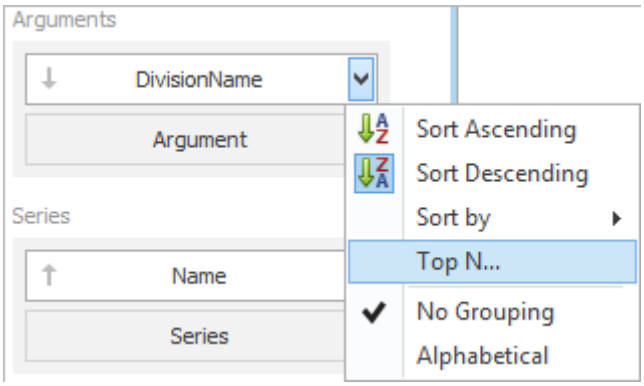
For dimension attributes, the Filter Editor contains a list of all values. You can select the values that you wish to display.

For hierarchies, a tree is displayed instead, allowing you to filter individual values at any hierarchy level.

Top N

The **Top N** feature allows you to display only a limited number of values that correspond to the highest or lowest values of a particular parameter.

1. To display the top values in a dimension, select **Top N** from the data item menu.



2. In the Top N Values dialog, check the **Enabled** check box and specify the following settings.

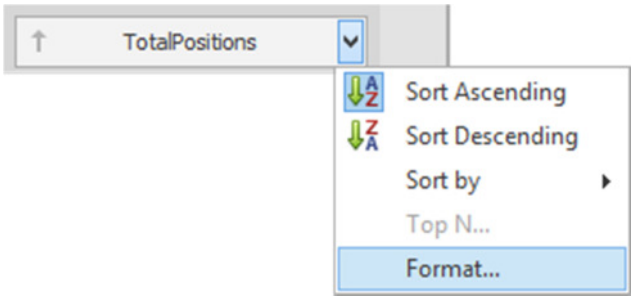
Mode	Specifies whether top or bottom values should be displayed.
Count	The number of values to be displayed.
Measure	The parameter according to which the top or bottom values will be determined.
Show "Others" value	If enabled, all values that are not the top/bottom ones are consolidated in the "Others" value.

Formatting data

Dashboard allows you to customize various data format settings for numeric and date-time values.

Formatting numeric values

1. To specify a format for numeric values, select **Format** in the data item menu.



This invokes the **Numeric Format** window.

2. In the **Format type** field, select the required format type.
3. Other format settings are only in effect for specific format types.

    1. **Unit** The unit to which values should be converted.
    2. **Precision** The number of fractional digits that should be displayed.
    3. **Currency** Defines the currency sign and format settings that should be used to display currency values.
       To learn about currency formatting specifics, see the Currency formatting specifics section below of this document.
    4. **Currency culture** For currencies used in a region with several cultures, specifies the culture that defines format settings.
    5. **Include group separator** Specifies whether or not separators should be inserted between digit groups.

Formatting date-time values

To specify a format for date-time values, use the **Format** submenu in the data item menu. This submenu lists the available format types that depend on the selected group interval.

Currency formatting specifics

The Dashboard allows you to specify currency format at two levels: for individual data items and for the entire dashboard.

1. Data Item Currency

    - To specify which currency to use for a particular data item, select **Format** from the data item menu.
    - In the **Numeric Format** dialog, select *Currency* in the **Format type** field and use the **Currency** combo box to select the required currency.

- For regions with several cultures, you can also select the culture that will be used to format currency values.
- You can also apply the default dashboard currency by selecting *Use dashboard settings* in the **Currency** field.

2. Dashboard Currency
   You can also specify the default currency for the dashboard. This setting will be applied to dashboard items that have no currency defined.

   - To set the dashboard currency, click the **Currency** button in the Ribbon.
   - This invokes the **Dashboard Currency** window. In this window, select the required currency using the **Currency** combo box.
   - For regions with several cultures, you can also select the culture that will be used to format currency values.
   - You can also specify the client culture that should be used for the dashboard by selecting the *Use client system settings* item.

Interactivity

This section describes features that enable interaction between various dashboard items. These features include Master Filtering and Drill-Down.

The section consists of the following topics.

Master filtering

Drill-down

Master filtering

The **Dashboard** allows you to use any data-aware dashboard item as a filter for the entire dashboard (**Master Filter**). End-users can select elements in a **Master Filter** item (chart bars, pie segments, grid records, etc.) to filter data in the rest of the dashboard by the selected values.

Master filtering modes

The Master Filter item supports two selection modes.

- **Multiple** Allows you to select multiple elements in the Master Filter item. To enable this mode, use the Multiple Master Filter button in the Data tab.
  To clear the selection in the Master Filter item, use the **Clear Master Filter** button in the dashboard item caption.
- **Single** Allows you to select only one element in the Master Filter item. When this mode is enabled, the default selection will be set to a Master Filter element. You can change this selection, but cannot clear it. To enable this mode, use the **Single Master Filter** button in the **Data** Ribbon tab.

Filtering across data sources

When different items in a dashboard are bound to different data sources, you can specify that a particular Master Filter should be applied across data sources. This means that it will apply filtering to fields with matching names in all data sources.

NOTE Fields are matched by their full names. For fields in other data sources to be affected by Master Filtering, their names must match the name of the field in the current data source, and they must belong to the same hierarchy level so that their full names also match. For instance, Customer.City and Customer.Address.City will not be treated as matching fields.

To enable filtering across data sources, use the **Cross-Data-Source Filtering** button in the **Data** tab.

Preventing items from being filtered

You can prevent specific dashboard items from being affected by Master Filters, so that Master Filtering will never be applied to them. To do this, use the **Ignore Master Filters** button in the **Data** tab.

Drill-down

Dashboard provides the **drill-down** feature, which allows end-users to change the detail level of data displayed in a dashboard item. This feature enables users to drill down to display the details, or drill up to view more general information.

To enable drill-down, use the **Drill-Down** button in the **Data** tab.

NOTE If the selected dashboard item contains several types of elements that can be used for drill-down, the Ribbon will provide the appropriate buttons to switch between these types (e.g., **Arguments** and **Series** buttons for the Chart).

To return to the previous detail level (drill up), use the **Drill Up** button in the dashboard item's caption or in the context menu.

Dashboard layout

This section describes the features related to the dashboard layout.

The section consists of the following topics.

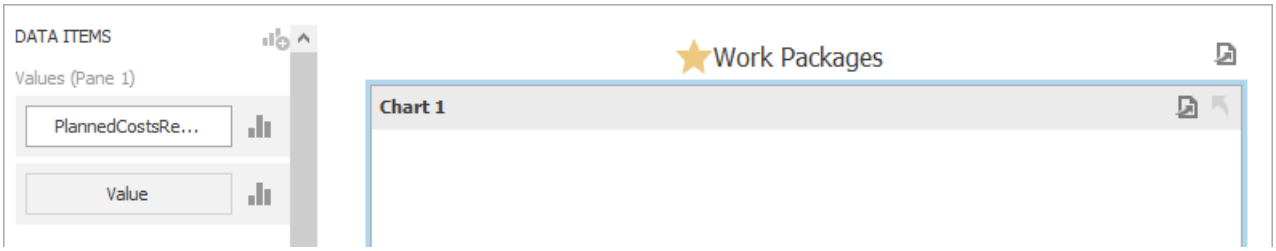
Dashboard title

Dashboard items layout

Dashboard item caption

Dashboard title

The **Dashboard Title** is located in the **Dashboard Title Area**, which is displayed at the top of the Dashboard. The dashboard title can contain text or image content.



1. To change the title settings click the **Title** button on the **Home** tab.
2. This invokes the **Dashboard Title** dialog, which allows you to change the text within the dashboard title, add an image, etc.

   NOTE If you add an image to the dashboard title using the **Load** button, the dashboard XML file will contain the URL to access the image. If you add the image using the **Import** button, the dashboard XML file will contain an image as a byte array.

TIPS The dashboard title area can contain command buttons.

- Print button allows end-users to print/export the dashboard.
- Parameters button allows end-users to modify dashboard parameter values. To learn more about parameters, see the Using dashboard parameters topic.

Dashboard items layout

The **Dashboard Designer** provides the capability to arrange and resize dashboard items in various ways, using simple drag-and-drop operations. You can also arrange and resize dashboard items using an API provided by the Dashboard.

Item Resizing

You can resize individual items within a specific layout group (or an entire group) by dragging their edges.

Item Positioning

You can change the position of a dashboard item via drag-and-drop, using one of the following approaches.

- If the caption of the dashboard item is visible, click it and hold down the left mouse button while dragging the item.
- If the caption of the dashboard item is not visible, click the icon in the top left corner, and hold down the left mouse button while dragging the item.

Depending on the required dashboard item position, a new layout group is created (if required) to maintain the arrangement of items. Thus, the dashboard item can be inserted to the desired area of a new or existing dashboard layout group.

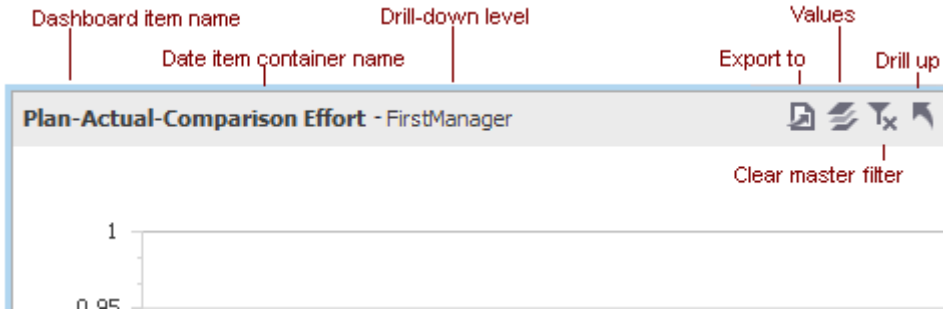
The drag-and-drop indicator shows possible positions for the dashboard item...

...and sequentially displays areas that can be occupied by the dashboard item. The image below illustrates how a dashboard item is dragged.

NOTE You cannot move the layout group to a position within its own subtree.

Dashboard item caption

Each dashboard item has a caption that is displayed at the top of this item. The caption contains static text along with other information, as well as command buttons.



- To show or hide the caption of a dashboard item, click the **Show Caption** button in the **Design** tab.
- Or right-click the item when designing the dashboard, and click the **Show Caption** menu item.

The caption of the Dashboard item contains the following information and buttons, depending on the dashboard item type.

Names	Dashboard Item Name - represents the static text within a dashboard item's caption. Data Item Container Name - represents the name of the data item container. To learn more about data item containers, see the Data Sections topic for the corresponding dashboard item. You can change default names using the Edit Names dialog. To invoke this dialog, right-click the item when designing the dashboard, and click the Edit Names... menu item.
Interactivity Information	Drill-Down Level - shows the current detail level of data displayed in a dashboard item.
Command Buttons	Export to button - allows you to print or export a dashboard item. To learn how to print individual dashboard items, see Print the project list. Values button - invokes a drop-down menu that allows you to switch between provided values (in the pie, card, gauge and maps dashboard items). To learn more, see the Data Sections topic in the Providing Data section for the corresponding dashboard item. Clear Master Filter button - allows you to reset filtering when a dashboard item acts as the Master Filter. To learn more, see the Master Filtering topic in the Interactivity section for the corresponding dashboard item.

Drill Up button - allows you to return to the previous detail level when the drill-down capability is enabled for this item. To learn more, see the Drill-Down topic in the Interactivity section for the corresponding dashboard item.

Work packages view

Topics

Manage the work package view

Set up the work package refresh interval

Manage the work package view

Clarify tasks and responsibilities with work packages. Assigned team members know exactly what to do, and when to do it.

Create, assign and organize team tasks in work packages without having to create a timed project plan. InLoox PM prvides you with the view over all projects.

TIP For more information see Work packages.

Article content

Work with the work package view

Features in the work package list

Work package side panel

Work with the work package view

1. To open the work package view, do one of the following.

    - Click InLoox PM tab on the Outlook Ribbon and then Work Packages.

NOTE In Outlook 2007 the work package list is automatically displayed, if you are added as resource to the work package click.

- Click Work Packages in the tree structure on the left under Projects.

2. Do one or more of the following:

- Open an associated project Choose one work package from the list and click Open Project, in the InLoox PM group.
- Display work package details Choose one work package from the list and click Open Details, in the Actions group.
- Mark work package as complete Choose one work package from the list and click Mark Complete, in the Actions group.
- Synchronize with Outlook elements Choose one work package from the list and click Synchronize. Choose from the drop-down list With Outlook-Calendar or With Outlook-Task.
- Book a time tracking entry to a project Choose one work package from the list and click Add Time Tracking Entry, in the Actions group.
- Change work package view Choose from the following in the Display group:
    - **My** Displays personal work package.
    - **My teams (project manager's view)** Displays work packages of all members of projects of which you are a manager.
    - **All (project manager's view)** Displays work packages of all members of projects of which you are not a manager.
- **Display the done work packages** Click **Include Complete** in the **Display** group to see all work packages that marked as complete.
- **Print a work package view** **Click Print**, in the **Current View** group, **to start the quick print feature of the archive view.**
- **Refresh** Via the **Refresh** button, in the **Current View** group, all changes will be updated and the view reloaded.
- **Filter the needed information** Click **Filter**, in the **Current View** group.

Features in the work package list

The following feature can be found in the work package list:

- **Open a work package** Double-click on an entry in the list. In the **Work Package Details**dialog box you can open an associated project and see the following details:
    - Project name and number
    - Planning element
        - **Element Name**, **Start** and **End** of the work package
        - **Description**
    - Work package
        - Resource
        - Work amount in hours
        - State (completed or open). The planning item will be immediately marked with the check mark in the planning, if you will activate the **this work package is completed** control box.

Features in the context menu

The context menu provides you with almost all basic features that are also on the InLoox PM Ribbon, such as **Open Details...**, **Open Project**, **Open Associated Project**,**Work Package Completed**, **Synchronize**. It has also such features as **Reload** and **Show Filter**. Right-click in the list to open the context menu.

- **Choose Fields** This feature sorts and organizes the projects by important data.
    - On the **Choose Fields** dialog box click one field, e.g. **Customer**, and drag it into the column headers.
    - Reset the fields per Drag&Drop into the dialog box.

- Group work packages For the best overview you can group the work packages. Do the following:
  - Group by one of the column header by clicking on it and dropping to the group field above the columns.
  - Click on column header and drop it to the column headers of the list to resert the grouping.

Work package side panel

You have always an overview of all work packages with the **Work package** side panel no matter from wich Outlook folder you works.

This way you can open the **Work package** side panel.

Click **InLoox PM** tab on the **Outlook Ribbon** and then **Show Work Package List** in the **Extras** group.

NOTE In Outlook 2007 the work package list is automatically displayed, if you are added as resource to the work package click.

You can find the following features on the side panel:

- A click on the empty space in the work package list invokes the Ribbon menu.
- A double-click on the entry from the list invokes the Work Package Details dialog box.

  NOTES
  - The description of all these features from the Ribbon van be found in the upper section.
  - The description the Work Package Details dialog box can be also found in this section.
- Group work packages For the best overview you can group the work packages. Do the following:
  - Group by one of the column header by clicking on it and dropping to the group field above the columns.
  - Click on column header and drop it to the column headers of the list to reset the grouping.
- Search work packages Use the Search feature above the work package list.

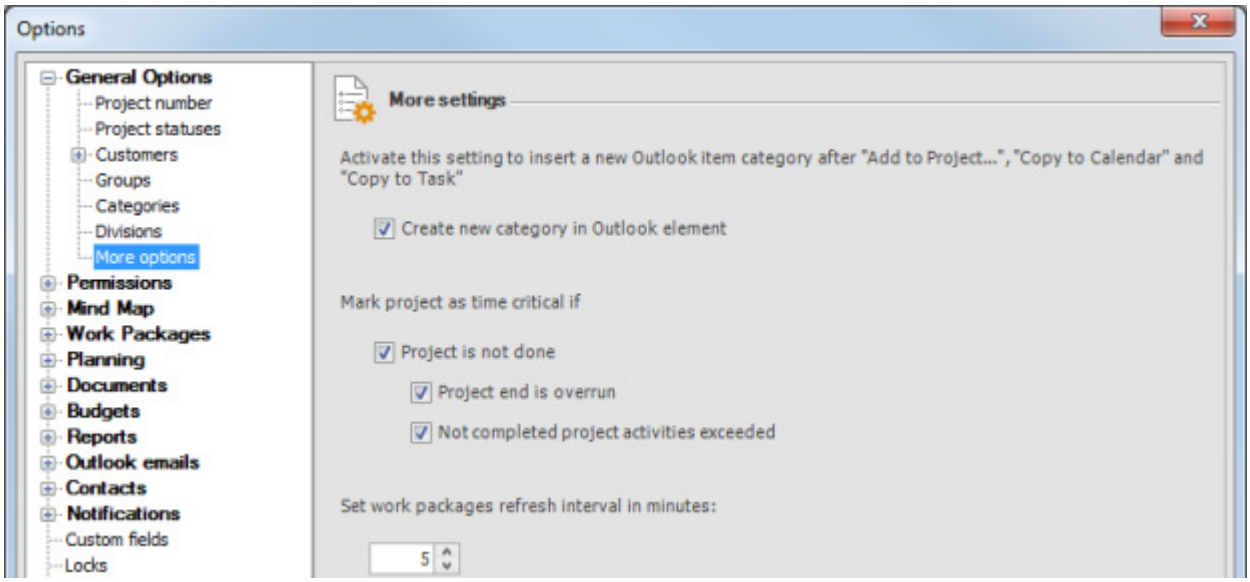
  TIP Use the filter feature to quickly reach the needed data from each column. For more information, see see Search and find projects.

Set up the work package refresh interval

With InLoox PM you can set manually the refresh interval for work packages in the work package list.

IMPORTANT A modification can only be done by an InLoox PM user with administrator permissions.

1. Open the **InLoox PM Options** dialog box.
2. Under **General options**, click **More options**. On the right side there is the **More options** area.



3. Set up the interval, which is shown in minutes.
4. Click **OK** or **Apply.**

   The data will be saved in the data base and is valid for all InLoox PM users.

Resources

Topics

Work with resources

Change the colour scheme of the resources

Work with the workload diagram

Work with resources

Manage the resource capability and work load more efficiently with the visual resources overview. It integrates both project work packages from InLoox PM and appointments from the Microsoft Exchange free/busy service. This way, you always have an instant and complete overview of all project resources – be it team members, rooms, or tools.

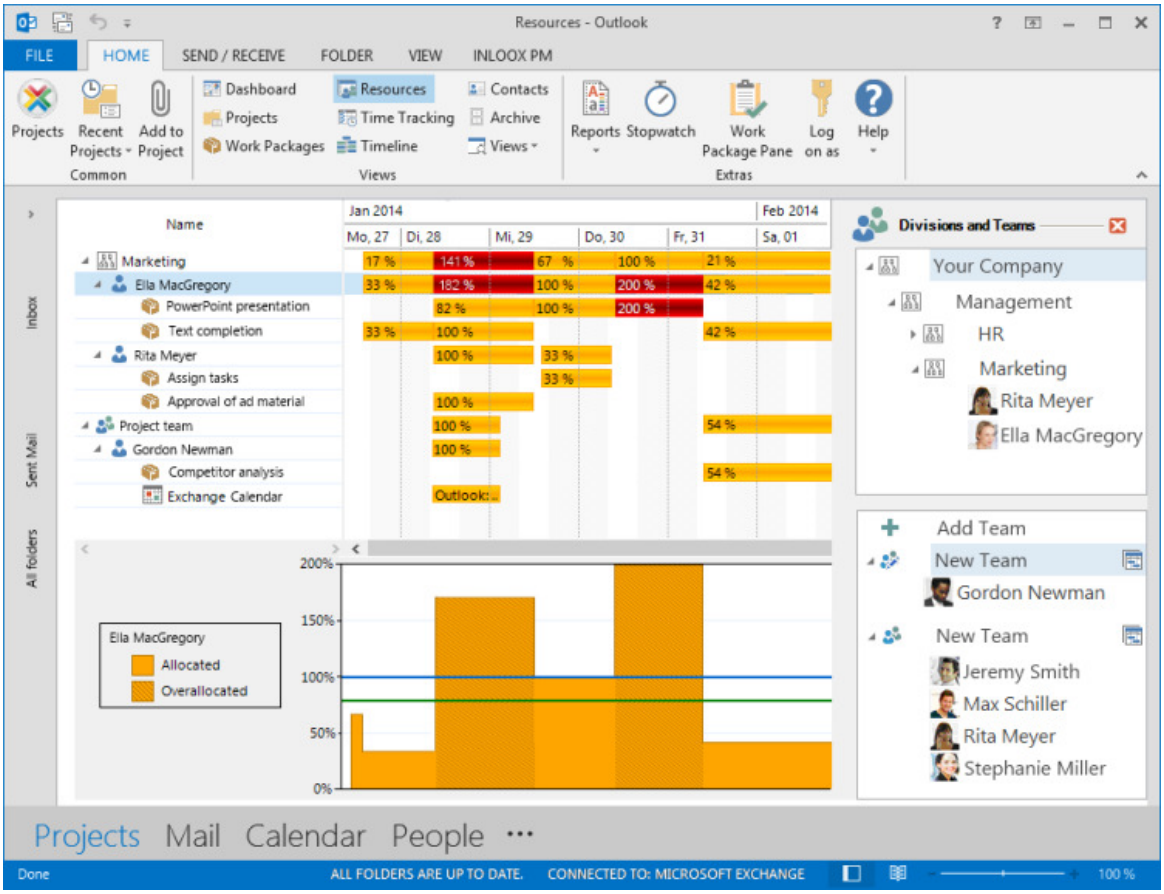
1. To open the resource overview, do one of the following:

   - On the **InLoox PM** tab, in the **Views** group, click **Resources**.
   - Click **Projects** at the bottom of the screen and then click **Resources** in the tree structure on the left.

   The resource overview loads all resources system-wide with added work packages. The overview is structured according to the divisions and the resources are displayed according to this structure.

   TIP To learn how to add the resources to the divisions, see Adjust the division structure.

   NOTE In Outlook 2007 click **Extras** in the **InLoox PM Toolbar** and choose **Resources** from the list.



2. On the **Start** tab, perform one or more of the following actions:

   - **Show work package details** Select one work package from the structure and click **Open Work Package** in the **Actions** group.

     TIP It invokes the **Work Package Details** dialog box. For more information on how to work with the dialog box, see Manage the work package view.

   - **Assign another resource to the work package** Select one work package from the structure and click **Reassign** in the **Actions** group.

   - **Define the time frames** On the **Start** tab, in the **Current view** group, click **Date Range**. Choose from the drop-down list between **Today**, **Week**, **Month** and**Year**. You can also enter your own data by clicking **Custom**.

   NOTE All resources that are not occupied during the defined period are hidden. Use the button **Add resources** to always display resources with whom you work often, regardless of the date settings.

   - **Enlarge or reduce the resources** On the **Start** tab, in the **Current view** group, click **Zoom In** or **Zoom Out** to change the zoom level of the view. The available values are:

- Years
- Quarters
- Months
- Weeks
- Days
- Hours

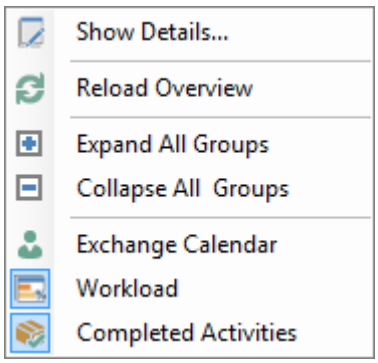
- **Print resources** On the **Start** tab, in the **Current view** group, click **Print Overview** or **Load Chart** to start the quick print feature of the resources.
- **Refresh** Use the **Refresh** button to update all changes and reload the view. This button can be found on the **Start** tab in the **Current view** group.
- **Show exchange calendar** On the **Start** tab, in the **Display** group, click **Exchange Calendar**. This option displays or hides the information of the Free/Busy feature of Microsoft Exchange Server.
  InLoox PM takes account of the Exchange Server calendar information when calculating the workload, if this option is activated.
- **Show workload labels** On the **Start** tab, in the **Display** group, click **Workload**. This option displays the work load in percent in the time bars.
- **Show completed activities** On the **Start** tab, in the **Display** group, click **Include Complete**. All activities with the status "done" will be displayed, if this option is activated.
- **Display the side panel for divisions and teams** By clicking the button **Divisions and Teams**, in the **Display** group, you can display or hide the side panel.
- **Add a resource** To include another resource into the analysis it is necessary to add it.
  - On the **Start** tab, in the **Display** group, click **Divisions and Teams** in the **Resources** group, click **Add Resource**.
  - On the side panel you can choose between divisions and team and drag the needed resource.
  - Via Drag& Drop you can also remove the selected division and team back to the side panel.
  - Show and hide resources in the utilization overview by clicking **Planning** symbol .

NOTES Information from the free/busy-feature of Microsoft Exchange Server **cannot** be opened:

- at any time for any time period for external resources.
- in the offline mode for internal resources.

Context menu of the resources

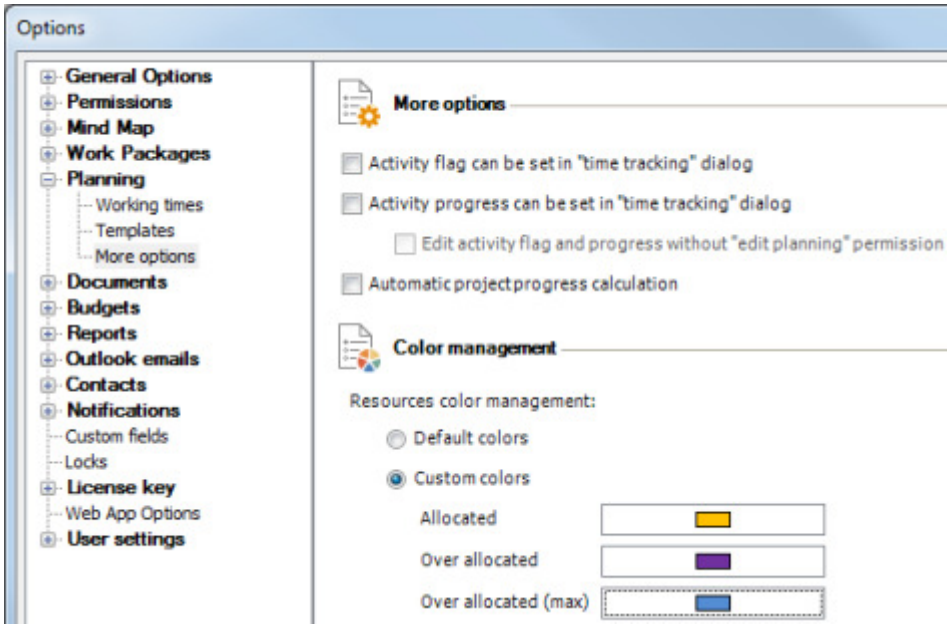
The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, namely **Add Resources**, **Delete Resources**, **Reset View**,**Show Exchange Calendar, Show Workload Labels and Show Completed Activities**. It also provides features of the workload diagram, like **Expand** and **Collapse All Groups**, **Show Details**. Right-click in the resource list or the workload chart to open the context menu.



Change the colour scheme of the resources

Any user can individually change the colors used in the resource overview.

1. Open the dialog box **InLoox PM Options**.
2. Click **Planning** in the navigation pane and then click **Planning details**. Below you find the **Color Management** area.



3. Choose between **Default Colors** or **Custom Colors**.
4. If you choose **Custom Colors** you can freely define the colors of **Allocated**, **Over Allocated** or **Over Allocated Max**.
5. Click **OK** or **Apply** to apply the colors to the resources.

Work with the workload diagram

The load chart provides a central overview of the allocation of all relevant resources that is always up-to-date.

To open the resource overview, do one of the following:

- Click the InLoox PM tab, then click in the InLoox PM Ribbon, in the Views group, Resources.
- Click Projects at the bottom of the screen and then click Resources in the tree structure on the left.

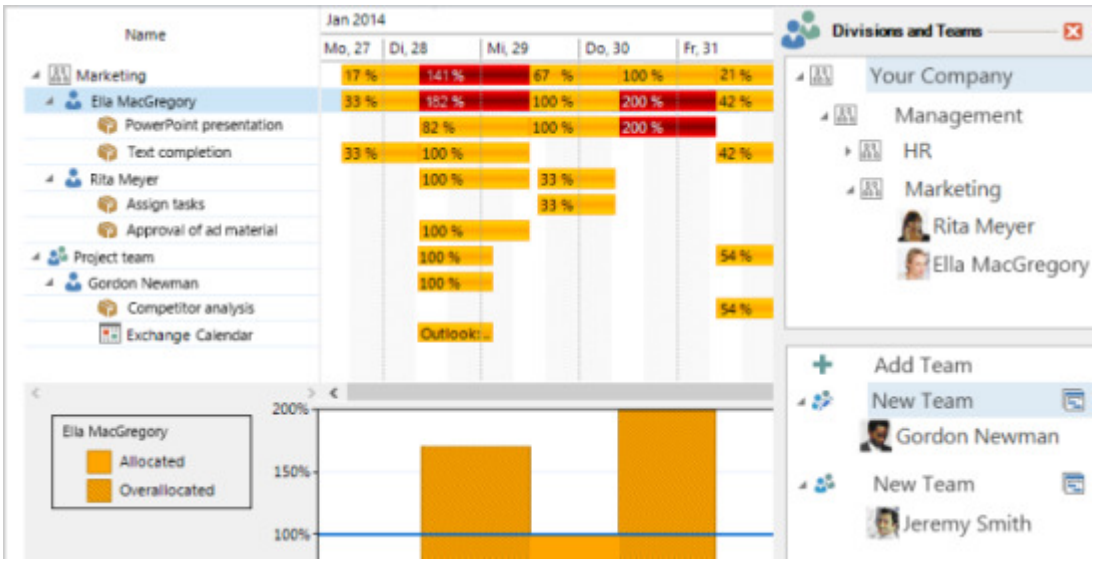
In this case, the **Resource Overview** loads resources system-wide.

NOTE In Outlook 2007, click **Extras** in the **InLoox PM Toolbar** and choose **Resource Overview** from the list.

You can adjust the utilization view and add any resources from the **Divisions and Teams** side panel.

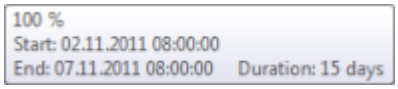
1. In the **View** group, click **Divisions and Teams** to invokes this side panel.
2. Select a division or a team and drag it into the utilization view.

3. In the view the group utilization is now displayed.
4. Via Drag& Drop you can also remove the selected division or team back to the side panel.
5. Show and hide resources in the utilization overview by clicking **Planning** symbol .



The following features are available:

- The view always filters the resources and workloads by the time period specified by Select time period.
- Duration and degree of the workload are shown by the bars in the upper right part:
  - Yellow bar (workload 1% - 100%)
  - Red bar (workload 101% - 149%)
  - Dark red bar (workload over 150%)
- The example shows the overloading of the resource "Ella Macgregory", which results from the occupation in two activities. If appointments are on record in the Outlook calendar of an Exchange resource, the resource counts as fully loaded (100%) in the given time period. To hide the calendar deactivate the option **Display Exchange calendar**.
- Today's date is shown by a vertical yellow day line.
- A click on the arrow left from the element displays the workload details. These include the work packages and activities to which the resource is assigned and.
- A double-click on an element opens a **Details** dialog box.
- A click on an element displays a graphical overview of the workload data within the defined period.
- The details will be displayed, if the cursor is moved over a bar:



- The percentage indicates the workload of the resource. The time period and duration display the length of the workload.
- A yellow field indicates that a resource is occupied, but not over allocated in the specified time period.
- A shaded yellow field indicates that a resource is over allocated in the specified time period.

TIP You can edit several entries in the load chart at the same time by clicking the respective entries while holding down the CTRL key. Then right-click to open the context menu and perform the required action.

Time tracking view

Topics

Adjust the time tracking view

Create a reminder

Record personal time efforts with the stop watch

Adjust the time tracking view

The time tracking enables you to create time tracking entries without opening a project and provides you with the overview of the time tracking entries from all current projects.

Article content

Work with the time tracking view

Features of the time tracking list

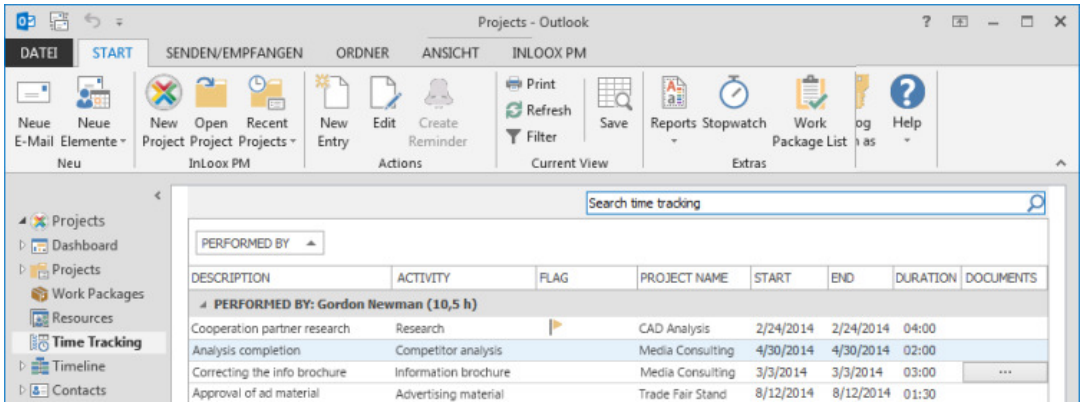
Work with the time tracking view

1. To open the time tracking view, do one of the following:

1. Click the **InLoox PM** tab on the **Outlook Ribbon** and then **Time Tracking**.

   NOTE In Outlook 2007, click **InLoox Folder** in the **InLoox PM Toolbar** and then **Time Tracking** in the InLoox PM project list.

2. Click **Time Tracking** in the tree structure on the left, under **Projects**.



2. On the **Start** tab, perform one or more of the following actions:

- **Open a project** Choose an entry from the time tracking list and click **Open Project** in the **InLoox PM** group.
- **Create a new entry** In the **New** group, click **New Entry**. In the **Add to Project** dialog box, choose a project from the list and click **OK**. In the **New Entry** dialog box, fill out the fields.
- **Edit an entry** Choose an entry from the time tracking list and click **Edit** in the **Actions** group. In the **Edit Item** dialog box make the changes you want.
- **Create Reminder** Choose an entry from the time tracking list and click **Create Reminder** in the **Actions** group.
- **Print the time tracking view** Click **Print** to start the quick print feature of the time tracking view.
- **Search for the entries by using a filter** In the **Current View** group, click **Filter**.
- **Refresh** All changes will be updated and the view reloaded via the **Refresh** button in the **Current View** group.
- **Issue a report** Optionally, you can also issue a report on this view by clicking **Reports** in the **Reports** group.
- **Record work times** In the **Extras** group, click **Stopwatch**.

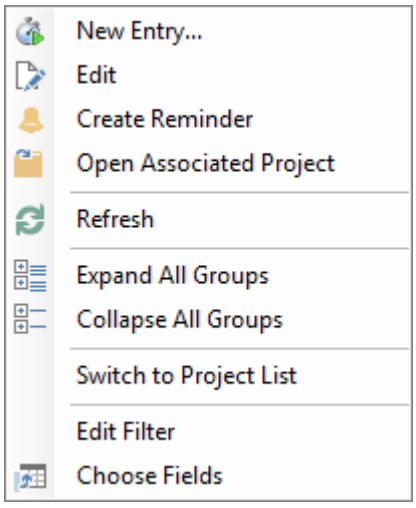
Features of the time tracking list

The following features can be found in the time tracking list:

- **Open an entry** Double-click on one item in the time tracking list or right-click on the item to open the context menu and choose **Open** from the list.
- **Group the time tracking list** Draw the column name into the area above the list.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, such as **New Entry..**, **Edit**, **Create Reminder**, **Open Associated Project**, **Refresh** , **Show Filter**. It has also provides the features **Expand** and **Collapse All Groups** and **Switch to Project list**. Right-click in the time tracking list to open the context menu.



- **Choose Fields** This feature sorts and organizes the entries by selected data.
  - On the **Choose Fields** dialog box, click one field, e.g. **Customer**, and drag it into the column headers.
  - Reset the fields via Drag and Drop back into the dialog box.

Create a reminder

You can create a reminder for each time tracking entry, e.g. call again.

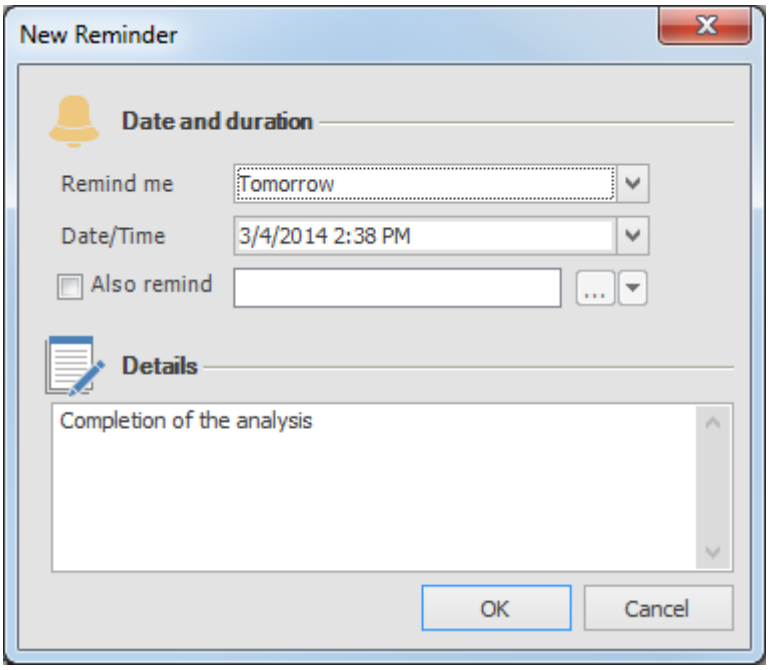
1. Click the **InLoox PM** tab on the **Outlook Ribbon**, then click **Time Tracking**.

   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.

2. Choose an entry from the **Time Tracking** list.
3. In the **Start** tab, in the **Actions** group, click **Create Reminder**.

   NOTE In Outlook 2007, click **Create Reminder** in the InLoox PM project list.

4. In the **New Reminder** dialog box, perform the following actions:



   1. In the **Date and duration** area, choose from the **Remind me** drop-down list an option.
   2. In the **Date/Time** box, choose the date and time for the reminder.
   3. Optionally, you can send a reminder to other persons:

      1 Activate the **Also remind** check box.

      2 Click and choose from the **Select Contact** dialog box a name.

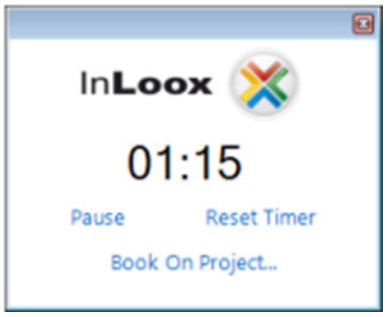
      3 Click **OK**.

   4. In the **Details** area, type additional notes.
   5. Click **OK**.

      Now, you can see the new reminder in your Outlook calendar at the time you have entered.

Record personal time efforts with the stop watch

Record your personal working times up-to-the minute with the InLoox PM stop watch. Afterwards, you can book the recorded working time to a project. This facilitates the consistent and complete documentation of activities for purposes such as billing.



1. Click the **InLoox PM** tab on the **Outlook Ribbon** and then **Stop Watch** in the **Extras** group.
2. Now, the stop watch box is displayed at the bottom.
3. Perform the following actions in this dialog box:

    - Click **Start** to start recording.
    - You can pause the time tracking by clicking **Pause**.
    - You can reset the stop watch by clicking **Reset**.

4. Click **Add to Project...**, if you have finished time tracking.
5. On the dialog box **Add to Project** perform the following actions:

    1. In the project list, choose a project, to which you want to add the time tracking entry.

        TIPS

        - Use the analitycal **filter** to display only projects that meet the defined criterion. For more information, see Search and find projects, in the Use filters section.
        - Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project.
        - Use the command **Recent projects**. The drop-down list displays projects you opened recently, organized by numbers.
        - Click **Clear selection**, if you want to change the choice.

    2. Click **OK**.

        Fill in the **New Item** dialog box with the required information.

        TIP For more information see Create and edit a time tracking entry.

NOTE The context menu contains several commands to adjust the project list view. Right-click in the project list to open the context menu.

Timeline

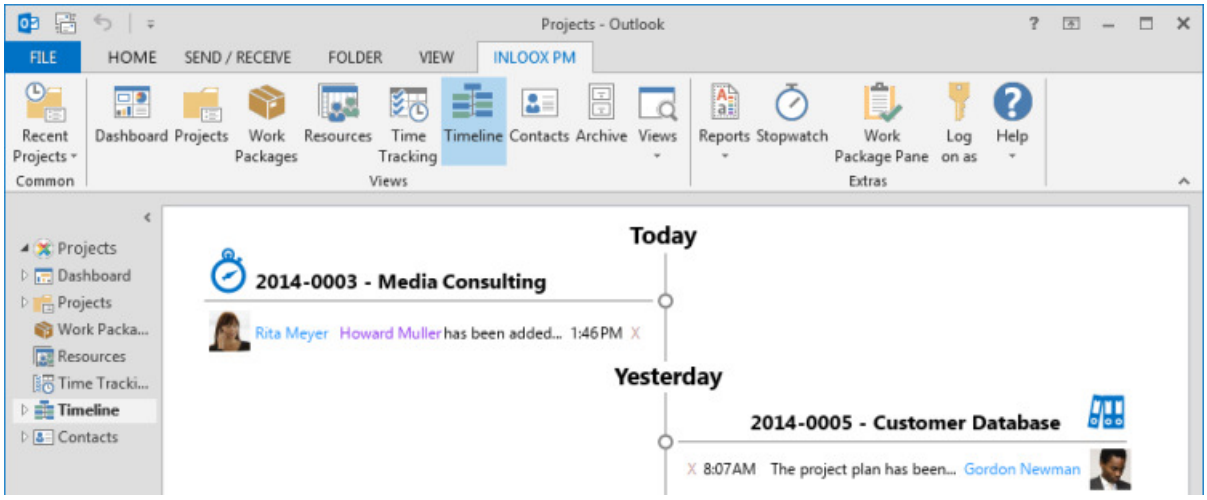
Work with timeline

This feature allows you to trace all changes made to the project. Every change, made by a member of the project team, is recorded in the timeline, when the project is saved. It provides you with the information about all changes with project name, time and description, with the hyperlink for the attached documents, etc. The timeline helps you to stay up-to-date, special when several participants work with the same project.

To open the timeline view, do one of the following:

- Click **InLoox PM** tab on the **Outlook Ribbon** and then **Timeline**, in the **Views** group.
- Click **Projects** at the bottom of the screen and then click **Timeline** in the tree structure on the left.

  NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Timeline** in the InLoox PM project list.



Now you can see the recorded changes to the projects as a single entry.

- Click project name to open it.
- Tha contacts are marked in blue. Click it to open.
- The added documents are marked in pink. Click the hyperlink to open them.
- The following information from the **Manage** project page are marked in green: project name and number, division, customer, category, status, schedule (start and end).

- The saved comments are marked in red. Click it to view.
- You can also delete any entry by clicking the cross symbol.

The following features are available in this view:

- Display changes of your project In the Display group, click Only my projects.
- Show the old changes In the Display group, click Older entries.
- Define the time period In the Display group, click By Date. Choose from the drop-down list between Today, Yesterday and Day before yesterday. You can also enter your own data by selecting Custom start date.

NOTE Click **Refresh** to update the change history.

InLoox PM contacts

Topics

Activate the contact management

Add a contact

Authorize InLoox PM contacts

Add, manage or delete an address book

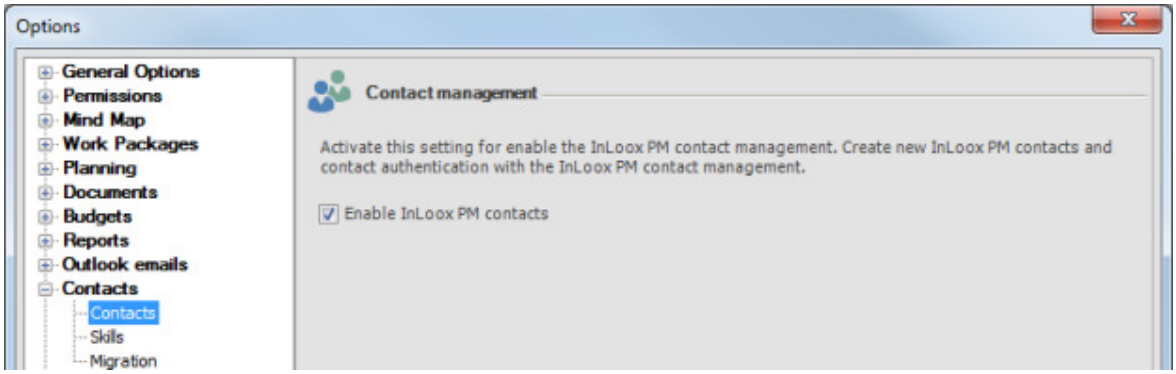
Adjust the contact view

Activate the contact management

Due to the contact management, InLoox PM can be used with full functionality without Microsoft Exchange Server and can, also, be combined with alternative groupware servers. Administrators can activate or deactivate the InLoox PM contact manager in the InLoox PM options, according to their individual requirements.

IMPORTANT You need administrator permissions to activate the contact management in the InLoox PM options. The InLoox PM contact management is only available in InLoox PM multi-user versions (InLoox PM Workgroup Server and InLoox PM Enterprise Server).

1. Open the **InLoox PM Options** dialog box.
2. In this dialog box, click **Contacts**. On the right side, there is the **Contact management** area:



3. Activate the **Enable InLoox PM contacts** check box.
4. Click **OK** or **Apply**.
5. Restart your Outlook.

   Now, you can see the **Contact** button on the **InLoox PM Ribbon**, in the **InLoox PM** tab, in **the View** group.

Add a contact

The InLoox PM contact manager gives users the possibility to create an “InLoox PM contact” for each project member, even if they are not available as Outlook or Exchange contacts. You can save the InLoox PM contacts and edit the information about people and organizations you communicate with.

The procedure of creating and editing is the same.

1. On the Outlook Ribbon, click the **InLoox PM** tab.
2. On the **InLoox Ribbon**, in the **Views** group, click **Contacts**.

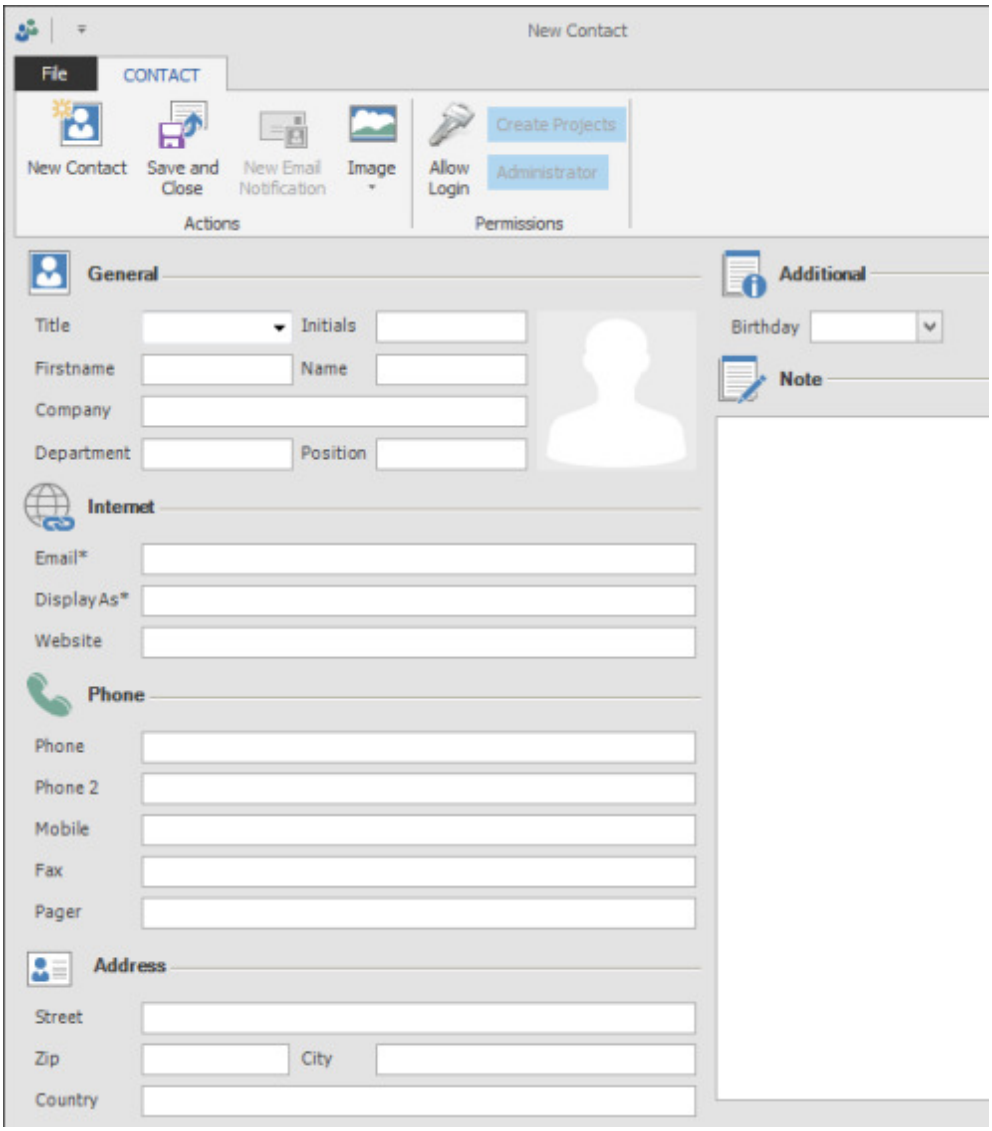
   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Contacts** in the InLoox PM project list.

3. On the **Start** tab, in the **New** group, click **New Contact**.

   NOTE In Outlook 2007, click **New Contact** in the InLoox PM project list.

4. To assign a new contact to the address book choose first an address book from the drop-down list **Address Book**, then click **New Contact**.

5. In the **New Contact** dialog box perform one of the following actions:



1. In the **General** area enter the general information to the contact such as **Title**, **First name**, **Name**, etc.
2. Add a picture to a contact:

    1 On the **Contact** tab, in the **Actions** group, click **Picture**, add then click **Add Picture**.

    2 Browse to find the picture and double-click on it.

    NOTE Use also the space for the picture next to the **General** area.

3. In the **Internet** and **Phone** area, enter the following information: **Email**, **Website**, **Phone**, **Fax**, **Pager**.

    NOTE For multiple phone numbers, use the fields **Phone 2** and **Mobile**.

4. In the **Address** area, type the business address information of this contact in the respective fields.
5. Optionally, you can add a birthday reminder in the **Additional** area.
6. Type a note in the **Note** area, if you want.

   TIP InLoox PM provides you with a range of formatting features. For the detailed description, see Create and change comments in the Customize comments section.

6. As soon as you have entered all information perform one of the following actions:

   - **Create more contacts** On the **Contact** tab, in the **Actions** group, click **New** contact.
   - **Finish entering new contacts** In the **Actions** group, click **Save and close**.
   - **Send an email notification to the contact** In the **Actions** group, click **Email notification**.

     NOTE You will find these commands as well as the command **Save** on the **File** tab.

7. On the **Contact** tab, in the **Permissions** group you can allow this contact to log in, and assign the basic permissions.

   TIP For more information on how to create an account, see Create an InLoox PM account.

IMPORTANT

- The contact management must be activated in the InLoox PM options in order to create new contacts. For more information see Activate the contact management.
- The **Contact** dialog box for already saved contacts also contains the **Projects, assigned with this contact** area. There, you see all projects to which this contact is assigned. The standard grouping is set according to the project roles.

Authorize InLoox PM contact

InLoox PM enables project managers to provide InLoox PM contacts with the necessary authorizations. The InLoox PM contact can be, for example, allocated as a resource in a project and be notified of upcoming project tasks.

1. Activate the contact management in the InLoox PM options.
2. Now, you can add new InLoox PM contacts.
3. Create a new InLoox PM account in the InLoox PM options.

4. Set user-based permissions for the created InLoox PM contact.

Optionally, you can set the permissions in the project, on the management page.

1. Open an existing project or create a new one.
2. On the **Management** page, in the **In charge** area add team members for the project. Choose a contact from the InLoox PM address book.
3. Click **Save and Close**.
   With role-based permissions, the InLoox PM contacts get access to those projects, where they are involved as team members.

Add, manage or delete an address book

You can add or manage the InLoox address books in the **Contacts** view. The InLoox address book is a collection of address books or address lists, created from your InLoox PM contacts.

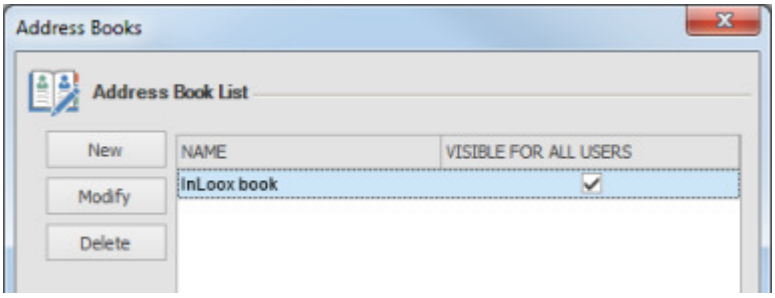
1. On the **Outlook Ribbon**, click the **InLoox** tab.
2. On the **InLoox Ribbon**, in the **Views** group, click **Contacts**.

   NOTE In Outlook 2007, click InLoox Folder in the InLoox Toolbar and then Contacts in the InLoox PM project list.

3. On the **Start** tab, in the **New** group, click **Address book**.

   NOTE In Outlook 2007, click Address book in the InLoox PM project list.

4. Choose **Manage Address Books...** from the drop-down list.
5. In the **Address Books** dialog box perform one of the following actions:



- **Create a new address book** Click **New**. In the **Create Address Book** dialog box, type a name in the **Address Book Name** area.

Activate the **Visible for all users** check box, if you want to share this address book with the other users. Click **OK**.

- **Edit an existing address book** Choose an address book from the list and click **Modify**. The further procedure is the same as in the point above.
- **Remove an existing address book** Choose one address book from the list and click **Delete**.

6. Click **OK**.
   Now, you can see all changes in the drop-down list **Address book**.
   The new address book is also saved in the tree structure on the left part of the window, under **Contacts**.

Adjust the contact view

The contact view displays all existing address books and their contacts. It also provides with different features to comfortably manage contacts and address books.

Article content

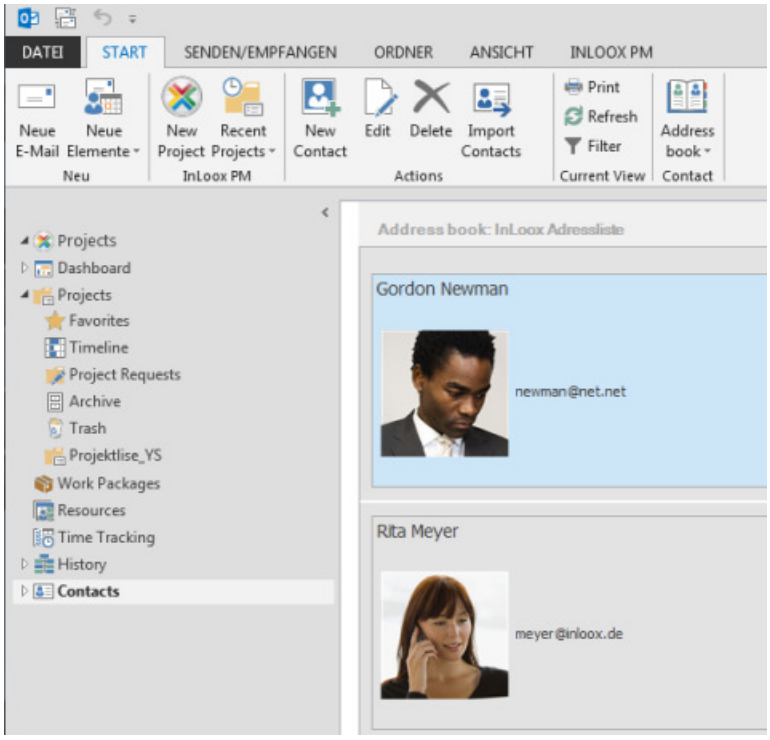
Work with the contact list

Features in the contact list

Work with the contact list

1. On the **Outlook Ribbon**, click the **InLoox** PM tab.
2. On the **InLoox PM Ribbon**, in the **Views** group, click **Contacts**.

NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Contacts** in the InLoox PM project list.



3. Do one of the following:

   - Create a new contact In the New group, click New Contact.
   - Edit a contact Choose a contact from the list and click Edit in the Actions group.
   - Delete a contact Remove one contact by clicking Delete in the Delete group.
   - Filter the contact information Click Filter in the Current View group.

     TIP To learn how to work with the filter, see Search and find projects, the Use filters section.

   - Print the contact list In the Current View group, click Print to start the quick print feature of the contact list.
   - Refresh By clicking the Refresh button in the Current View group, all changes are updated and the view is reloaded.
   - Create a new address book and manage it In the Contact group, click Address book and choose from the drop-down list Manage Address Book.

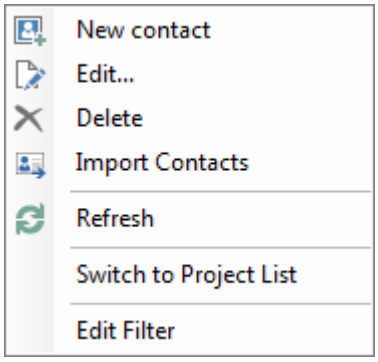
Features in the contact list

The following features can be found in the contact list:

- **Open a contact** Double-click on one item in the list, e.g. to edit it.
- **Search the contacts** The **search bar** permits to find quickly any contact.

Features in the context menu

The context menu provides you with almost all basic features that can also be found on the InLoox PM Ribbon, such as **New contact**, **Edit...**, **Delete** and **Refresh**. It also provides features such as **Switch to Project List** and **Show Filter**. Right-click in the list to open the context menu.



Keyboard shortcut

- **F2** Refresh the project list.
- **CTRG+P** Print the project list.

Reports

Topics

Create a report

Filter report data

Manage the saved reports

Manage the report templates

Work with the report designer

Types of report templates

Create a report

At the push of a button, the highly flexible report designer issues reports such as project summaries, budget lists, expense reports and plan/actual comparisons in a variety of file formats like Microsoft Excel, Microsoft Word, HTML, PDF and many more.

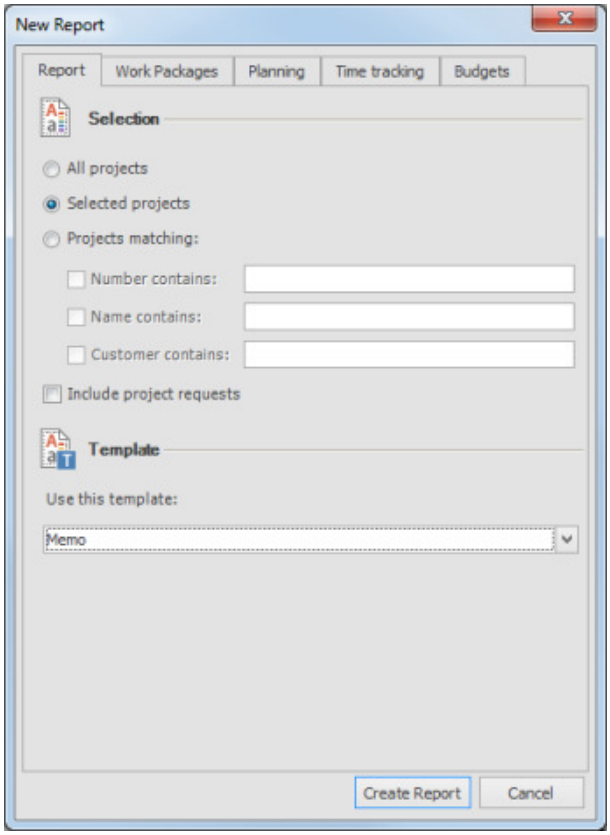
1. Click Projects on the Outlook Ribbon to switch to the InLoox PM project overview.

   NOTE In Outlook 2007 click InLoox PM Folder in the InLoox PM Toolbar.

2. Choose one or more project in the project list.
3. On the InLoox PM tab, in the Reports group, click Reports and choose from the drop-down Create Report.

   NOTE In Outlook 2007 click Reports in the InLoox PM Toolbar.

4. In the New Report dialog box, in the Selection area choose All project, or Selected projects, or Projectts matching.



5. Optionally you can filter the report data in this dialog box.

   TIP For more information see Filter the report data.

6. In the Template area select InLoox PM templates from the drop-down list.
7. Optionally you can save a report for quick access.

   TIP For more information see Manage the saved reports.

8. Click Create report after you have made all changes you want.
9. In the Print Options dialog box choose the settings you want:

   - In the **Print Target** area, in the **Direct to...** file choose in the drop-down list the output format, e.g. PDF, Excel or Word.
   - In the **Options** area specify individual pages or sets of pages to be printed.
   - Click **Start**.

Filter report data

Report designer issues reports of any level of detail, e.g. by single activities, whole projects or for the whole company. Consolidation, aggregating and filtering are available for detailed reports and only for authorized users.

NOTE The filtering process for the saved reporst is the same as for the new reports.

1. Click Projectlist on the Outlook Ribbon to switch to the InLoox PM project overview.

   NOTE In Outlook 2007 click InLoox PM Folder in the InLoox PM Toolbar.

2. Choose one or more project in the project list.
3. In the InLoox PM tab, in the Reports group, click Reports and choose from the drop-down Create Report.

   NOTE In Outlook 2007 click Reports in the InLoox PM Toolbar.

4. In the New Report dialog box do one or more of the following:

- Filter the report data in the Report tab

    - In the **Selection** area choose between **All projects**, **Selected projects** or **Projects matching**. For the last option you can define the filter criterion such as**Number**, **Name** or **Customer** that the selected project contains.
    - Activate the **Include project requests** box to add the project requests to the report.
    - In the **Template** area choose a template from the drop-down list.

- Filter the report data in the Work Packages tab

    - Choose **All work packages** to include the complete list.
    - Choose **Time Work packages matching** to filter between **Date**, **Performed by** and **Group**.
    - Define the billable status for the report.

- Filter the report data in the Planning tab

    - Choose **All planning items** to include the complete list of planning elements.
    - Choose **Planning items matching** to define, which planning items, **summaries**, **activities** or **milestones**, will be included into the report. You can specify their combination by selecting the corresponding check box.
    - Optionally you can choose the time interval by selecting **Date between** and by choosing the date.

- Filter the report data in the Time Tracking tab

    - Choose **All entries** to include the complete list of time tracking entries.
    - Choose **Time tracking entries matching** to filter between **Date**, **Performed by** and **Group**. You can specify their combination by selecting the corresponding check box.
    - Define the billable status for the report.

- Filter the report data in the Budgets tab

    - Choose **All Budgets** to include the complete list of budgets and budget position.
    - Choose **Budgets matching** to filter between Expenses (actual (time tracking), actual (other), revenues (plan), expenses (plan), revenues (plan)), Date and Status. You can specify their combination by selecting the corresponding check box.
    - In the **Show positions** area selected the positions you want (**Already billed**, **Not billed**, **Billable** and **Not billable**)

5. Click **Create report** after you made all changes you want.

TIP For more information on how to create a report, see Create a report.

Manage the saved reports

You can save the reports with the predefined filter data for quick report issue.

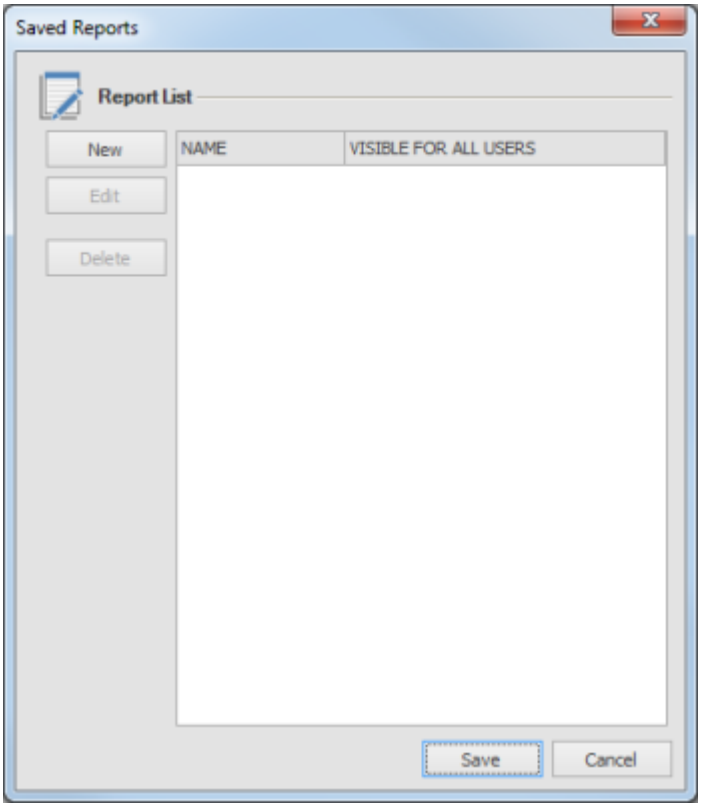
Do the following to save a report:

1. Click **Projects** on the **Outlook Ribbon** to switch to the InLoox PM project list.

   NOTE In Outlook 2007 click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Choose one or more project in the project list.
3. On the **InLoox** tab, in the **Reports** group, click **Reports** and choose from the drop-down **Save Report**.

   NOTE In Outlook 2007 click **Reports** in the **InLoox PM Toolbar**.
4. In the **Saved Reports** dialog box do the following:



- Save a new report by clicking **New**.
    - In the **New Report** dialog box type a name.
    - Activate the **Visible for all users** box, if you want to share this view with other authorized users.
    - Filter the report data as you want and click **Save Report**. The saved report is now displayed in the **Report List**, in the **Saved Reports** dialog box.
- Change the saved report. Choose one from the **Report List** and click **Edit**. In the **Report** dialog box filter the report data as you want and click **Save Report**.
- Remove the saved report from the **Report List** by clicking **Delete**.

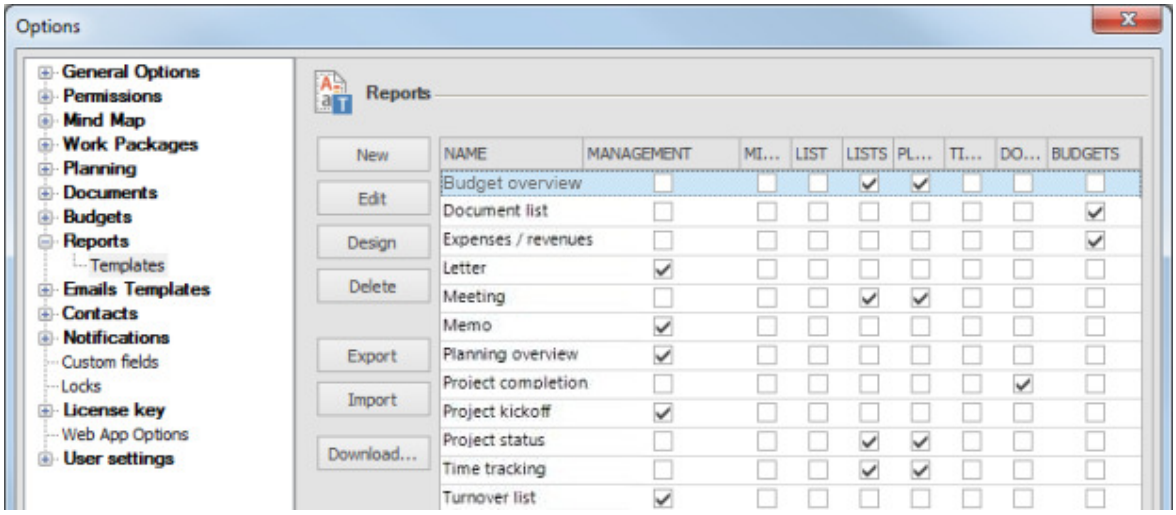
5. Click **Save** to save the changes.

Manage the report templates

You can customize the report templates as you want in the InLoox PM options. InLoox PM provides you with such different templates like schedule, budget overview, plan-actual comparison, cross-projects time sheets, memos, status report, cover letter, billing and offer templates. From the first moment you have the right tool for your project daily routine.

IMPORTANT A user requires read access and permission for using report templates to export the project data. For more information on how to assign permissions and the lis of available permissions, see Setup permissions and List of permissions.

1. Open the dialog box **InLoox PM Options**.
2. Under **Reports** click **Templates**. On the right side you will see the **Reports** area:



3. Do one or more of the following:

   - Create a new template by clicking **New**.

     - In the **Report** dialog box, in the **Name of the report** field, type a name.
     - Define also for which project page this report template will be created. Select the corresponding check box in the **Show as quickreport** in area. Click**OK**.

   - Change the existing template. Choose one from the list and click **Edit**. In the **Report** dialog box make the changes you want as it is described in the first point.

   - Change the template content by clicking **Design**. In the **InLoox PM Report Design** dialog box make the changes you want.

   TIP For some information on how to work with the report designer, see Work with the report designer. For the hole information see the included help in the**Report Designer** dialog box.

   - Remove the existing template from the list by clicking **Delete**.

   - Save a template in your local documents. Choose one template from the list and click **Export**.

   - Load e template from your local data, which you have received from other users. Click **Import** and choose a template in the **Open Report Template** dialog box, and then click **Open**.

   - Click **Download** to download the report templates from our website.

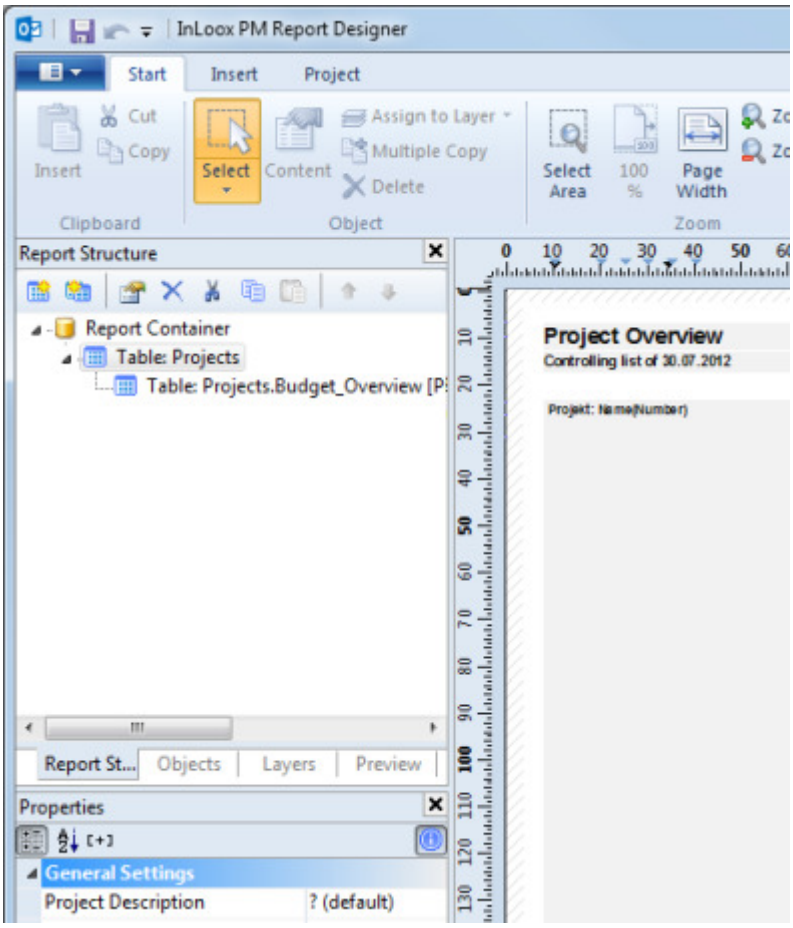
4. Click **OK** or **Apply** to save the changes in InLoox PM.

Work with the report designer

Customize the template content for report in the InLoox PM report designer that is available in the InLoox PM options.

IMPORTANT Please note that this chapter describes only the first steps for the report designer. The complete help document you will find in the **InLoox PM Report Designer** dialog box.

1. Open the dialog box **InLoox PM Options**.
2. Under **Reports** click **Templates**. On the right side you will see the **Reports** area:
3. In the **Reports** area choose one template, e.g. Time tracking, from the list, which you want to change, and click **Design**.
4. The following gives an example of how to add an additional data column to the **Time tracking** report in the **InLoox** PM **Report Designer** dialog box.



1. In the InLoox PM Report Designer dialog box click Report Structure.
2. In the Report Structure area above double-click Table: Projects.Time Tracking.

3. In the Table Contents dialog box, in the Data Line tab choose one line and click .
4. In the Edit Table dialog box, in the Data and Functions tab, in the tree structure click Fields, then Projects and afterwards Time Tracking.
5. Under Time Tracking choose the ChangedBy field, and click Insert and then OK.
   The added field is displayed in the right side of the Table Contents dialog box in the (Contents) field.
6. In the Edit Table dialog box, in the Header Line tab, click and choose Text from the drop-down list.
7. In the Edit Table dialog box, in the Data and Functions tab enter into the lower text field the text (including quotation marks): "Changed by".
8. Click OK.
9. Click again OK.
10. In the InLoox PM Report Designer dialog box click File and then Save.
11. Click again File and then Close.

5. Click **OK** or **Apply** to save the changes in the InLoox System.

Types of report templates

InLoox PM provides you with different types of report templates.

The description of each template is available in this table.

Report template	**Application in InLoox PM**
Project kick-off	Correspondence at start of project.
Letter	Correspondence concerning the project.
Project status	Outlook email with current project status.
Meeting	Meeting organization document.
Memo	Memorandum.

Report template	Application in InLoox PM
Planning overview	For exporting planning items from the planning page or across all projects in the InLoox PM project list.
Document list	For exporting documents from the document page.
Time tracking	For exporting time tracking entries from the time tracking page across all projects in the InLoox PM project list.
Budget overview	For exporting data from the budget page or across all projects in the InLoox PM project list.
Expenses / revenues	For exporting budgets of type expenses and revenues from the budget page or across all projects in the InLoox PM project list.
Turnover list	For exporting turnover lists from selected projects in the InLoox PM project list.
Project completion	Correspondence at end of project.

Interaction between InLoox PM and Outlook elements

Topics

Quick access panels for tasks and calendar

Quick access panel for contacts

Quick access panel for E-mails

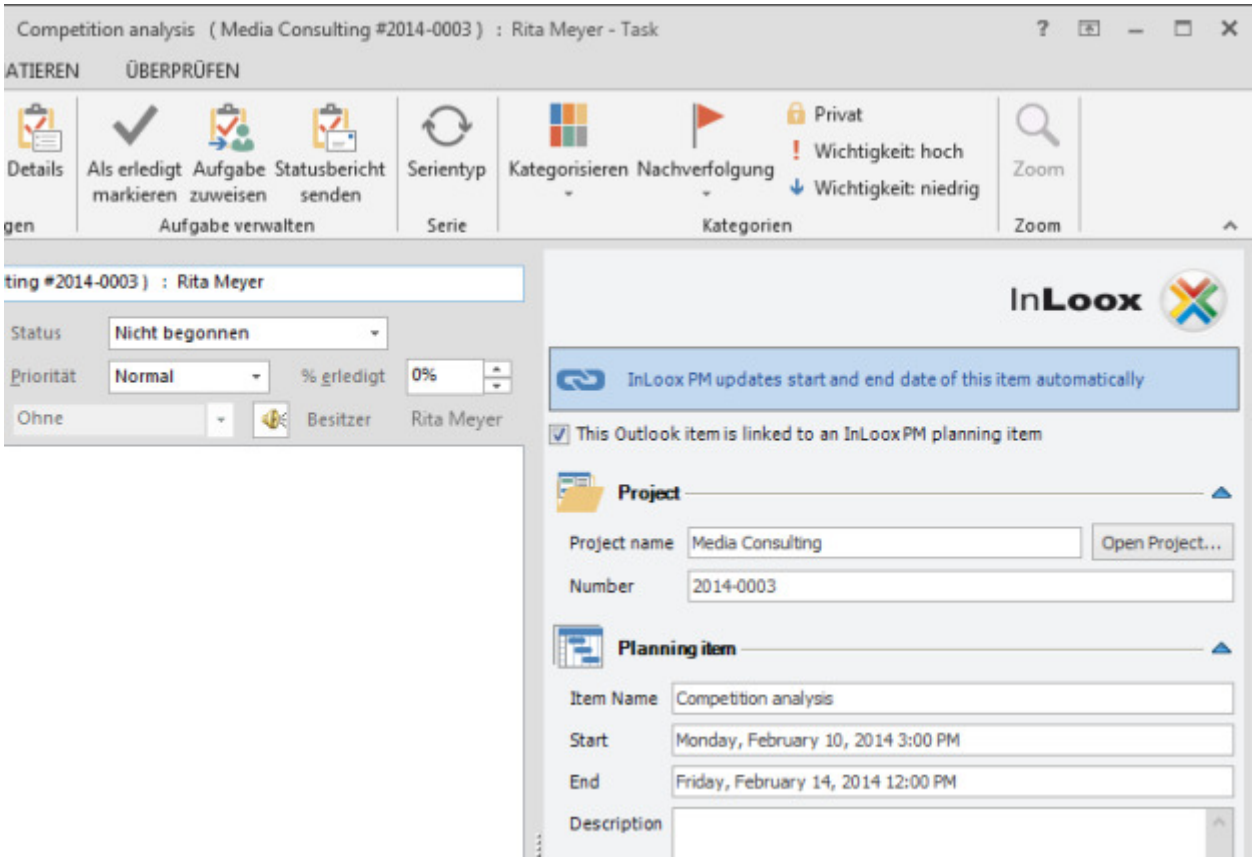
Customize email templates

Add Outlook elements to InLoox PM

Quick access panels for tasks and calendar

InLoox PM enables you to link Outlook tasks and appointments - by using quick access panels. InLoox PM synchronizes all information automatically.

Calendar items can be connected with planing elements in the InLoox PM project planning. You don't even have to open a project to gain real-time information about the respective project. Project planning changes, e.g. appointment changes, are automatically synchronized.



Article content

Synchronize with the task list / the calendar out of the project

Synchronize with the task list / the calendar out of the InLoox PM workpackage view or pane

InLoox PM items in the Outlook task list / the Outlook calendar

Synchronize with the task list / the calendar out of the project

Please follow these steps to synchronize the Outlook task list or the Outlook calendar out of a project:

1. Open the respective project by clicking **Projects** in the Outlook Ribbon. Now select the respective project from the project list and open it by double-clicking it.

   NOTE In Outlook 2007, click the **InLoox PM Folder** in the **InLoox PM Toolbar**. Then double-click the respective project in the project list.

2. In the project, on the **Start** tab, in the **Section** group, click **Planning**.
3. Click the planning element that is supposed to be synchronized.
4. On the **Edit** tab, in the **Actions** group, click **Synchronize (With Outlook Task, With Outlook Calendar)**.
   A new Outlook element will be created in the Outlook task list or the Outlook calendar.

Synchronize with the task list / the calendar out of the InLoox PM workpackage view or pane

1. This is how you can synchronize your Outlook task list or your Outlook calendar directly out of the InLoox PM workpackage view or pane:

   - Click the **InLoox PM** tab and then **Work Packages** in the **Views** group.

     NOTE In Outlook 2007, the workpackage list is displayed automatically in the Outlook calendar and task list, as soon as you have been added as a resource to the respective workpackage.

   - Click the **InLoox PM** tab and then **Work Package Pane** in the **Extras** group.

2. Select the **workpackage** from the list that is supposed to be synchronized.
3. Select **Synchronize (With Outlook Task, With Outlook Calendar)** in the **Actions** group.
   A new Outlook element will be created in the Outlook task list or the Outlook calendar.

InLoox PM items in the Outlook task list / the Outlook calendar

The respective Outlook item now is synchronized with the InLoox PM planning. On the right side next to the project, you will find this InLoox PM information:

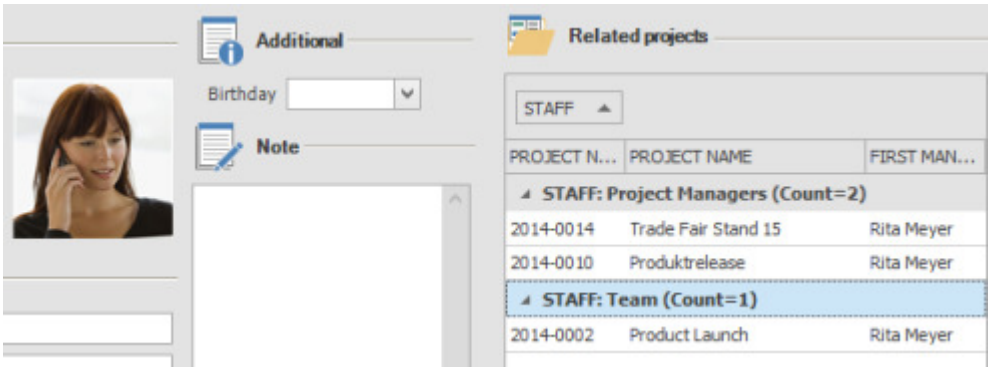
Element	Description
This Outlook element is linked to an InLoox PM planning element	Activate this check box if you want to keep the start and end date of this Outlook element synchronized with the start and end date of the InLoox PM planning element.
Project name	Name of related project.
Number	Number of related project.
Item name	Name of the InLoox PM planning element.
Start	Start of the InLoox PM planning element.
End	End of the InLoox PM planning element.
Description	Description of the InLoox PM planning element.
Resource	A team member that is assigned to this work package.
Work amount (h)	Workload of the resource.
Status	Shows you, whether the particular resource has completed his/her task.

NOTES

- Start and end date that have been changed from synchronized Outlook elements will be overwritten if the project plan is changed.
- The user no longer has to move a synchronized Outlook element.

Quick access panel for contacts

In InLoox PM, you can link Outlook contacts with the respective projects. So, you can see in the Outlook address book the role assumed by a certain contact - whether he or she is a project director, team member, customer or partner.



This is how you can use the quick access panel for contacts:

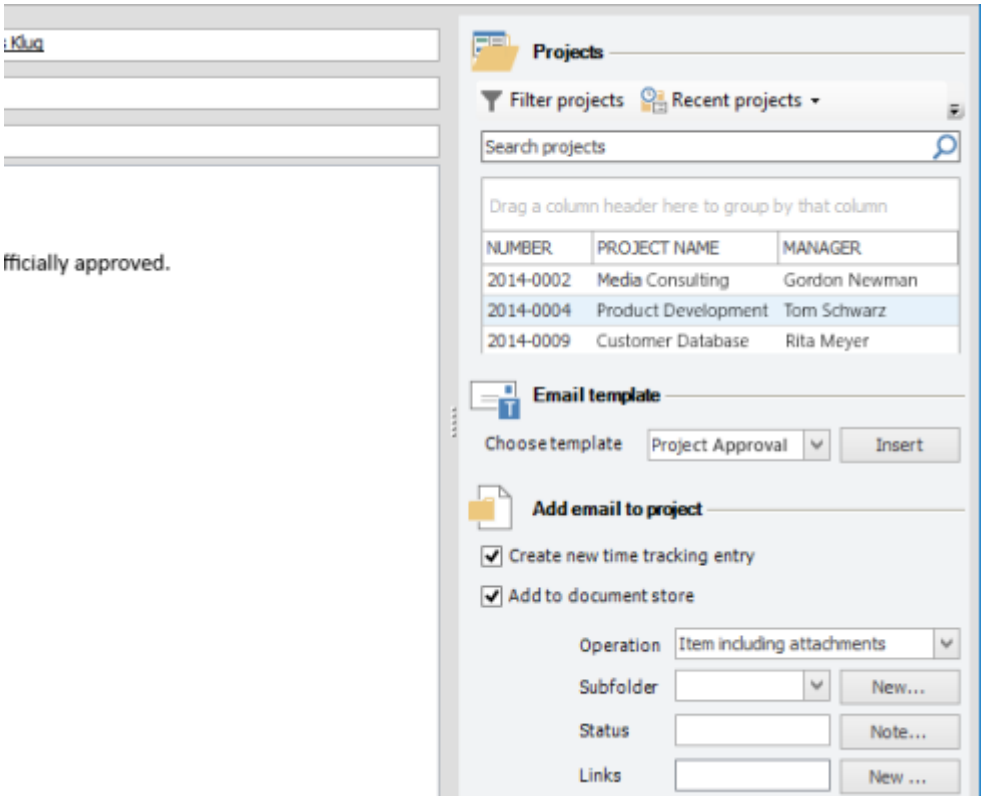
1. Open a contact
    - from your Outlook contact list.
    - from InLoox PM contact list. To open it click first InLoox PM tab, then Contacts, in the Views group.
2. Now you see a list of all projects this contact is assigned to.

The standard grouping depends on the contact's role in the project.

TIP For a detailed description of the InLoox PM items on the quick access panel, see Quick access panels for tasks and calendar, in the InLoox PM items in the Outlook task list / the Outlook calendar section.

Quick access panel for E-mails

InLoox PM provides you with rapid and comfortable assignment of e-mails to the project document storage. If you have already added the e-mail, you see its link.



Please follow these steps to record existing and new emails.

1. Open an email from your personal Outlook inbox (or any other folder) by double-clicking it.
2. Select a project from the quick access panel on the right side next to the email.

TIPS

- Use the **filter** to search for the project. For more information, see Search and find projects, in the Use filters section.
- Use the **Recent projects** button. The drop-down list displays projects you opened recently organized by numbers.
- Use the **Search projects** field to find the needed project information and click the ENTEr button.
- Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project.
- Click **Clear selection** , if you want to remove the selection.

3. In the **Add Document to Project** area you can choose from the following actions:

- Activate the **Create new time tracking entry** check box in order to add a new time tracking entry to the project. Time tracking entries are the records of time spent for a project, e.g. for

work carried out.

TIP By clicking **OK**, the **New Item** dialog box will be displayed. Fill out this dialog box with the required information. For more information, see Create and edit a time tracking item.

- Activate the **Add to document store** control box. With this option, you can assign any email attachments (files) to a project.

    1 In the **Operation** drop-down list, choose between **Item including attachments**, **Item without attachments**, **Only attachments** and **Item and attachments separately**.

    TIP For more information about management methods, see Add Outlook elements to InLoox PM, in the Management methods area.

    2 In the **Subfolder** drop-down list, choose a subfolder. You can also create a new one by clicking **New...**.

        1. In the **Create a New Subfolder** dialog box select the directory in which you want to create a new folder.
        2. Click **Create New Folder** and enter a new name.
        3. Click **OK**.

    3 In the **Status** field enter instructions, e.g. complete or awaiting release.

    4 Click **Links** to link the Outlook element with project elements. Click New on the left to the **Links** field. In the **Assign Document Relation** box select between mindmap nodes, work packages, time tracking items and paning elements. **Add** and then **OK**. InLoox PM displays a document as a paper clip on the page you have chosen. You can also open the document directly from this page.

4. Click **OK**.

Customize email templates

With email templates, you can insert pre-defined and project-based information text snippets into a new email. Email templates can be added or modified in the InLoox PM options.

Article content

Work with E-mail templates

Work with E-mail templates

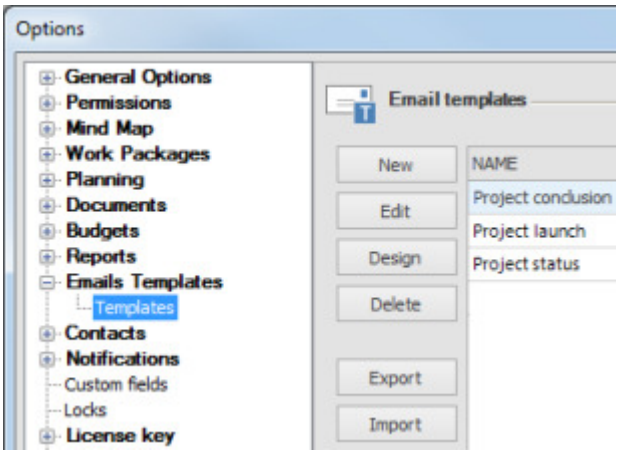
This is how you can use the email template feature in new emails:

1. Open a new email.
2. Select a project in the quick access panel.
3. Select an email template.
4. Add the selected template by clicking Insert.
5. The text template will be added to your email and the project manager of the selected project will be inserted to the email recipients.

Manage E-mail templates

You can create, rename or delete email templates in the **InLoox PM options**.

1. Open the dialog box **InLoox PM Options**.
2. Under **Email Templates** click **Templates**. On the right side you will see the **Email templates** area.



3. You can choose from the following actions:

   - Add a new template by clicking **New**. On the **New Email Template** dialog box, please follow these steps:

     1 Enter a name in the **Template Name** field.

2 Define the email field rules such as **Recipient**, **CC Recipient**, **BCC Recipient** and **Subject**. Click **Fields** and choose from the drop-down list the field you want, e.g. <PROJECT_MANAGER_0>.

3 Click **OK**.

- Change the saved template by clicking **Edit**. In the **Edit Email Template** dialog box, you can make your changes (see the first point).
- Customize the template content for a report with the InLoox PM email designer. Choose a template from the list and click **Design**.

  TIP For instructions on how to work with the InLoox PM report designer, see Work with the report designer and the help documentation of the designer.
- Remove a template permanently from InLoox PM. Choose a template from the list and click **Delete**.
- Load a template from your local data. Click **Import** and choose a template in the **Open Email Template** dialog box, then click **Open**.
- Save a template in your local data if you want to send it to other users. Click **Export** and choose a storage location in the **Save Email Template** dialog box, where you want to save it. Click **Save**.

  TIP Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Add Outlook elements to InLoox PM

Save files, links and Outlook elements with InLoox PM and organize them in the corresponding project folder

Emails, which include attachments, can be assigned directly to the project. InLoox PM offers a proper feature, which is always available from any part of Outlook.

NOTES

- The following standard elements can be posted directly to an InLoox PM project: emails, contacts, tasks, journal entries and calendar entries.

- Non-standard message types are **not** supported by InLoox PM.

Article content

Manage an attachment

Management methods

Manage an attachment

1. Choose an Outlook element, e.g. an email from your Outlook inbox.
2. On the **Outlook Ribbon**, in the **Start** tab, in the **InLoox PM** group, click **Add to Project**.

   NOTE In Outlook 2007, click **Add to Project** in the **InLoox PM Toolbar**.
3. In the **Add to Project** dialog box do the following:

    1. Choose a project from the project list, to which you want to add the element.

       TIPS

        - Use the **filter** feature to search for the project. Click **Filter projects** in the **Projects** section. For more information, see Search and find projects, in the Use filters section.
        - Use the **Recent projects** button. The drop-down list displays projects you opened recently organized by numbers.
        - Use the **Search projects** field to find the needed project information and click the ENTEr button.
        - Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project.
        - Click **Clear selection** , if you want to change the choice.

    2. In the Add Outlook element to project area, do the following:

        - Activate the **Create new time tracking entry** check box in order to add a new time tracking entry to the project. Time tracking entries are the records of time spent for a project, e.g. for work carried out.

          TIP By clicking **OK**, the **New Item** dialog box will be invoked. Fill out this dialog box with the required information. For more information, see Create and edit a time tracking item.

- Activate the **Add to document store** check box. With this option, you can assign any email attachments (files) to a project.

    1. In the Operation drop-down list, choose between Item including attachments, Item without attachments, Only attachments and Item and attachments separately.

        TIP Below, you find the description of all these operations in the Management methods area.

    2. In the Subfolder drop-down list, choose a subfolder. You can also create a new one by clicking New....
        1. In the **Create a New Subfolder** dialog box, select the directory in which you want to create a new folder.
        2. Click **New Subfolder** and enter a name for it.
        3. Click **OK**.
    3. In the **Status** field enter instructions, e.g. complete or awaiting release.
       Click **Notes** on the left from the **Subfolder** field enter comments and remarks to the document.
       Optionally, you can also format these comments. Use features such as cut, copy and paste, undo and redo, font, font size, font style (bold, italic, strikethrough, subscript, superscript and underline), font color, and text highlighting. You can also select the font size, increase or decrease the size by one increment, and change the case.
    4. Click **Links** to link the Outlook element with a project element.
       Via **New...** button on the left from the **Links** field you can create a new link.
       In the **Assign Document Relation** box you can choose between mindmap nodes, work packages, time tracking entries and planung elements to assign to. Click **Add** and then **OK**.
       InLoox PM displays a document as a paper clip on the page you have chosen. You can also open the document directly from this page.

3. Click **OK**.
   InLoox PM saves the Outlook element as a document on the **Documents** project page.

NOTE The context menu contains several options to adjust the project list view. Right-click in the project list to open the context menu.

- Expand or reduce the project list view Change the view by using Expand All or Collapse All to make the project list clear.
- Choose Fields This feature sorts and organizes the project by important data.
    - On the **Choose Fields** dialog box, click one field, e.g. **Budget critical**, and drag it into the headlines.
    - Reset the fields via Drag and Drop back into the dialog box.

Management methods

When you insert an Outlook element with attachment into an InLoox PM project, there are various options to handle a attachment.

Method	Action	Pros & cons
Element with attachment	InLoox PM assigns the email and the attachment in file form to a project. (Outlook does the same).	✚ Email and attachment are stored together. ━ The document list shows whether the element is carrying an attachment but no details of the attachment, such as name or type.
Element without attachment	InLoox assigns only the email to the project. All attachments will be removed.	✚ Saves storage space. ━Attachments can neither be displayed nor saved in InLoox PM.
Attachment only	InLoox PM assigns *only* the attachment to the project. The email is discarded.	✚ Removes superfluous correspondence. ━ Correspondence (including notes) can neither be read nor saved in InLoox PM.
Element and attachment separately	InLoox PM assigns the email and attachment to the project separately	✚ Correspondence is kept. Attachments can be seen in the document list with name and type.

Method	Action	Pros & cons
		- Relationship between correspondence and attachments is lost.

Customize and configure

Topics

- Notifications
- Change the language
- Generate personalized views
- Create custom fields
- Customize the InLoox PM language files
- Generate and edit groups
- Open the InLoox PM options
- Open the InLoox PM options in Outlook 2007
- Work offline with InLoox PM

Notifications

Themen

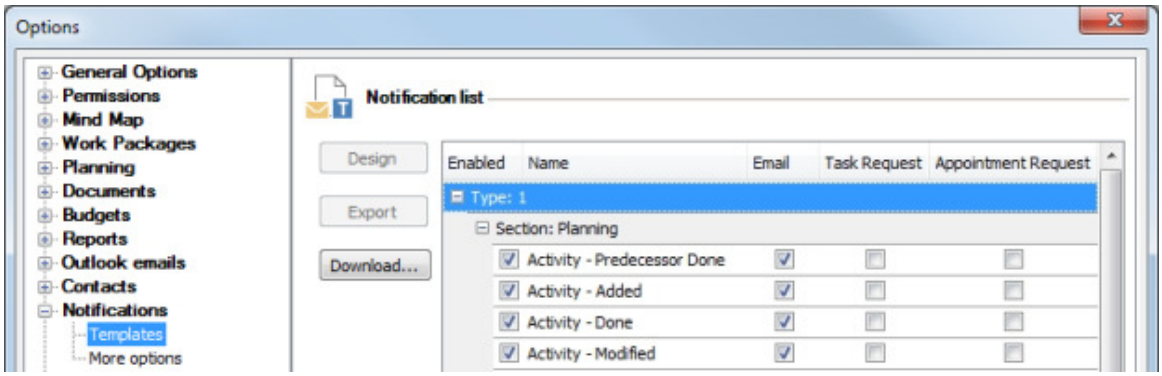
- Anpassen einer Benachrichtigungsvorlage
- Anpassen von Feldern in Benachrichtigungsvorlagen
- Anpassen von Typen in Benachrichtigungsvorlagen

Customize a notification template

Notifications enable the communication of project information. You can send them to those resources, whom the project planner wants to inform automatically.

InLoox PM provides you with various kinds of notifications for work packages, planning elements, documents and notes. Resources can receive information via email, task request or InLoox PM reminder. The notification templates contain predefined text elements which can be changed, deleted or modified.

1. Open the dialog box **InLoox PM Options**.
2. Below **Notifications**, click**Templates**. On the right side you see the **Notification list** area.



3. Choose one of the following options:

   - Edit the notification text by clicking **Design**. In the **InLoox PM Notification Designer**, you can make the respective changes.
   - NOTE For more information on how to work with the InLoox PM Notification Designer, see **Designer Help**, which you can find there.
   - Save a template in your local documents. To do this, choose one template from the list and click **Export**.
   - Click **Download** to download the planning templates from the InLoox website.
   - Activate one of the following control boxes in the columns **Email**, **Task request** or **Appointment request**. This way you define the type of the notification.
   - Deactivate the template in the line, e.g. **Work Package -Done** in the certain area. Such deactivated template cannot be used in the project anymore.

4. Click **OK** or **Apply** to save the changes in InLoox PM.

Customize notification fields

There are proper templates for each notification type. Customize individually each notification template with different fields. A **field** is a **wild card** for project information. Fields can be added or deleted from a notification template.

Please proceed as follows to add a field:

1. Open the **InLoox PM options**.
2. Click **Notifications** and then **Templates**.
3. On the right sight, you see the **Notification list**.
4. Select a template type from the list and click the **Design** button to get to the **InLoox PM Notification Designer**.
5. On the right side, you see the list of variables. Click **Variables**. Now, you see a list of all available fields.

For more information, please see the Notification Designer Help.

The following fields are available for notifications:

Field name	Description	Contents
DisplayName	Display name	Name of the work packages, planning elements, documents and project notes.
Description	Description	Multiple-line description of the planning element.
EndDate	End planning element	End date of the planning element.
Flag	Flag	Flag for the planning element (none, green, yellow, red).
GroupName	Group	Group to which the planning element belongs. The group is a sort criterion or a project cost center. TIP An internal price per hour is in file for each group. For more information on how to customize the internal prices and the available groups, please see Generate and edit groups.

Field name	Description	Contents
IsProjectEndDateFixed	Fixed deadline project	Specifies whether the project has a fixed completion deadline.
Link	Linked documents	Document paths (text-only) of the planning item.
Location	Location	Free text field. States where the planning element is to be carried out.
PlannerName	Name of planner	The name of the project planner, as stored in Outlook, e.g. Rita Meyer.
Progress	% completed	Completion degree of a planning element in percent. Numeric value between 0 and 100.
ProjectCategory	Project category	Category to which the project belongs.
ProjectCompany	Project company	Free text field of the customer's name in the project.
ProjectEnd	Project end	End date of the project.
ProjectName	Projekt Name	Short, free description of the project. The project name can be used several times.
ProjectNote	Project name	Multiple-line free text for the concise recording and communication of the significant aspects of the project. You can create a comment in the Comments area of the Management page.
ProjectNumber	Project number	Unique number to identify the project.

Field name	Description	Contents
		TIP For more information on how to customize the format of this number, please see Adjust the project number.
ProjectPriority	Project priority	Priority of the project.
ProjectStart	Projekt Start	Start of the respective project.
Projectstate	Project status	Specifies the state of project development
PSPCode	PSP code	PSP code = Work Breakdown Structure code. Free text field for identification of phases and milestones in large projects.
ResourceName	Name of resource	The name of the resource or recipient of the message, as stored in Outlook, e.g. Max Schiller.
ResourceList	Resources	List of all resources involved in a planning element, including the email address, e.g. Max Schiller (max.schiller@firma.de) Gordon Newman (gn@mailaddress.com).
StartDate	Start planning element	Start date of the planning element.
WorkAmount	Work amount	Work amount, which is done by the recipient resource of the planning element.

Customize notification types

You can notify resources via **e-mail**, **task request** or **meeting request**. There are templates for the different types of planning elements and events which you can customize.

Please proceed as follows to customize a notification template:

1. Open the **InLoox PM options**.
2. Click **Planning**, **Notifications**, **Templates**.
3. On the right sight, you see the **Notification list**.
4. Select a template type from the list and click the **Design** button to get to the **InLoox PM Notification Designer**.
5. Now, you can modify the selected notification template.

For more information, please see the Notification Designer Help.

Message name	Application
Work package - done	InLoox PM generates this message, if a work package is done. This way the project controller can see which resource has done his work.
Work package note - added	InLoox PM informs about new work package note is added in the Work Packages project page.
Work package - added	InLoox PM informs about new work package that is added on the Work Packages project page, from the mind map and in the planning.
Work package - resource added	InLoox PM generates this message, if a resource is added to a work package.
Work package - modified	InLoox PM generates this message, if a work package is changed on the Work Pakcages project page or directly in the project plan.
Work package - resource removed	InLoox PM generates this message, if a resource is removed from a work package .
Work package - deleted	InLoox PM generates this message, if a work package is deleted from the Work Packages project page or from the project plan, on thePlanning page.
Work package note - deleted	InLoox PM generates this message, if a work package note is deleted from the Work Packages project page.

Message name	Application
Document - added	InLoox PM generates this message, if a document is added to a Documents project page.
Document - deleted	InLoox PM generates this message, if a document is deleted from the Documents project page.
Document - modified	InLoox PM generates this message, if a document is edited on the Documents project page.
Activity - Predecessor done	InLoox PM generates this message, if a planning element, which is a predecessor, is done in the project planning. This way the project controller can see the progress of the planning.
Activity - added	InLoox PM informs about new activity that is added to the project planning.
Activity - done	InLoox PM generates this message, if an activity in the project planning is done. This way the project controller can see the progress of the planning.
Activity - modified	InLoox PM generates this message, if an activity is changed in the the project plan.
Activity - deleted	InLoox PM generates this message, if an activity is deleted from the project plan, on the Planning page.
Milestone - Predessecor done	InLoox PM informs about completed milestone predessecor in the project planning. This way the project controller can see which resource has done his work.
Milestone - done	InLoox PM generates this message, if a milestone in the project planning is done. This way the project controller can see the progress of the planning.
Milestone - added	InLoox PM informs about new milestone that is added to the project planning.

Message name	Application
Milestone - modified	InLoox PM generates this message, if a milestone is changed in the project plan.
Milestone - deleted	InLoox PM generates this message, if a milestone is deleted from the project plan, on the Planning page.
Project note - added	InLoox PM generates this message, if a project note is added to a Management project page.
Project note - removed	InLoox PM generates this message, if a project note is removed from Management project page.

Change the language

InLoox PM is a multilingual system. The operating language adjusts automatically to the **Region and Language Options** in the **Windows Control Panel**. The language can be changed manually during operation of InLoox PM at any time without the need to restart.

Please follow these steps to change the operating language:

Article content

Outlook 2010/2013 View

Outlook 2007 View

Outlook 2010/2013 View

1. Click the **File** tab.
2. Click **InLoox PM**.
3. Click **Change language**.
4. Select a language, e.g. **German**, **English**, **French**, **Italian**, **Spanish** or **Russian** from the list.

InLoox PM changes the language of all dialog boxes and screens.

Outlook 2007 View

Please follow these steps to change the operating language:

1. Click **Tools** in the InLoox PM Toolbar.
2. Click **Language**.
3. Select a language, e.g. **German**, **English**, **French**, **Italian**, **Spanish** and **Russian** from the drop-down list.

InLoox PM changes the language of all dialog boxes and screens.

Generate personalized views

Organize, sort, and group projects - e.g. by assigned responsibilities, deadlines, project type, priority, etc. You can save the created project list view and open it again as soon as you use the project list again.

Article content

Standard views included in InLoox PM

Generate a personalized view

Use and manage personalized views

Customize a view

Standard views included in InLoox PM

Use the standard views provided by InLoox PM. These views help you to display data in a flexible way.

TIP Learn more about the other views by default such as timeline, project requests and trash, see The views of the tree structure in the project list.

Generate a personalized view

InLoox PM enables you to save personalized views. Please follow these steps:

1. On the Outlook Ribbon, on the **Start** tab, in the **InLoox PM** group click **Projects**.

   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar**.

2. Now you can change the view directly in the project list.

   TIP For more information on how to do this, see Customize a view in this article.

3. On the **InLoox PM** tab, in the **Views** group click **More Views** and then **Save current view as**.

   NOTE In Outlook 2007, click **Actual Views** in the **InLoox PM Toolbar**.

   1. In the Save View dialog box, enter a view name.
   2. Activate the Visible for all users check box, if you want to share this view with other authorized users.
   3. Click OK.

      The new view is now displayed in the drop-down list More Views.

Use and manage personalized views

This is how you can use a personalized view:

1. On the Outlook Ribbon click **InLoox PM** tab.
2. In the **Views** group, click **More Views**.

   NOTE In Outlook 2007, click **Actual Views** in the **InLoox PM Toolbar**.

3. Select a view from the drop-down list, e.g. **Project controlling**.

   InLoox PM loads the saved view with customized data in the project list.

Proceed as follows in order to manage views:

1. On the Outlook Ribbon click **InLoox PM** tab.
2. In the **Views** group, click **More Views**.

   NOTE In Outlook 2007, click **Actual Views** in the **InLoox PM Toolbar**.

3. Click **Manage Views...** in the drop-down list.
4. In the Views dialog box do one or more of the following:

   - Edit view double-click the view you want ot edit or click Edit.
   - Remove view Remove permanently one view from InLoox PM. Choose a view from the list and click Delete.
   - Reset views Click Reset views, if you do not want alle changes to be accepted.

- **Export view** Save a view in your local documents. Choose one view from the list and click **Export**.
- **Load view** Load a view from your local data. Click **Import** and choose a view file in the **Import File** dialog box, then click **Open**.
- **Download view** Click **Download** to download an exisiting view template from the InLoox website.

Customize a view

In the Outlook Ribbon, on the **Start** tab, in the **InLoox PM** group, click **Projects** to open the project list. Now you can customize the project list view with the following possibilities.

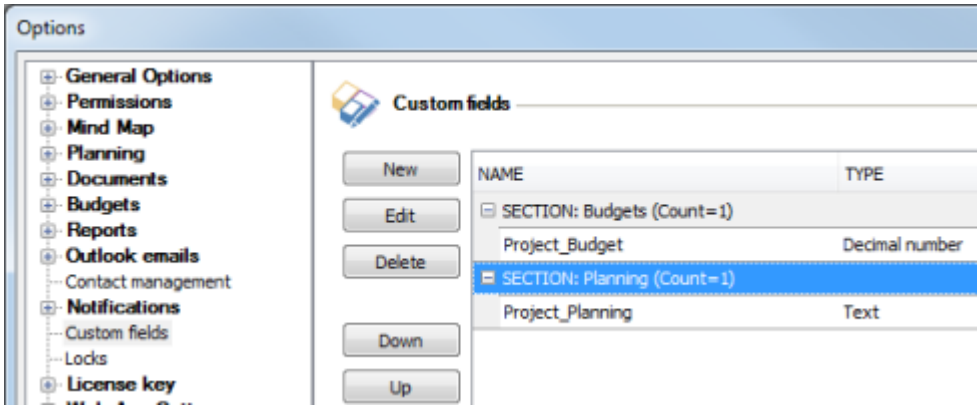
NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** to open the project list.

- **Sort the information in the project list** Click on a column by which the project list is supposed to be sorted.
  The project list will be displayed according to your choice. Click in the column to sort in rising or in descending order by clicking .
- **Group the projects according to the selected criterion** Click on a column, e.g. **Status**, by which the project list is supposed to be grouped.
  - Drag a column into the area above the column headers.
    The project list will be grouped by the selected criterion. Reset the grouping via Drag and Drop into the project list.
- **Add more information to the project list** Use the **Choose fields** feature to organize the project list by selected information.
  - Right-click on the project list to open the context menu.
  - Click **Choose fields** in the context menu.
  - On the **Choose fields** dialog box, click the field you want to add and drag it into the column headers.
    NOTE Reset the fields via Drag and Drop into the project list.
- **Define individual fields** You can implement the workflows for all users with this feature.
  Example: The development department staff only sees projects with the status **Development**. If the status changes to **Bill**, the project becomes visible to accounting staff; for other persons the project remains hidden.

Create custom fields

InLoox PM 8 allows you to expand the default data you use in your projects according to the project's unique requirements. You can create new fields either for the entire project or for specific areas in the project - Mind Mapping, planning, time tracking, documentation, and budgeting. You can rename custom fields at any point and as oftern as you need to. InLoox PM 8 supports several data types for custom fields. Please find below instructions for creating custom fields in InLoox PM 8:

1. Open the **InLoox PM Options** dialog box.
2. Click on **Custom fields**. The **Custom fields** setting section will open on the right.



3. You can do the following things:

   - Create a new custom field.

     1 Click on **New**.
     2 On the **New Custom Field** dialog box, in the **Name** field, type a name for the custom field that you want to create.
     3 Select the intended location from the **Location** drop-down list of the field (i.e. the list in which it is supposed to be displayed).
     4 Select a **Type** from the list. Possible types are:

       - **Text**: free text value/string.
       - **Integer**: integer value without decimal point.
       - **Decimal number**: decimal number with decimal point.
       - **Checkbox**: yes/no value.
       - **Date**: date value without time.
       - **List**: set of free text values / strings.

- **Currency**: decimal number with decimal point and currency symbol.

5 Optionally, you can define a default value by selecting **Edit default...** from the drop-down list.

1. In the **Edit Text** dialog box enter a default value.
2. The field type **List** also allows you to:
   - Change the order of the list items.
   - Specify, whether users may enter own values (**Allow add new items**).
   - Specify, whether empty selections are valid (**Allow empty selection**).

6 Select **OK**.

- Edit an existing custom field.

1 Select the custom field you want to change.
2 Click on **Edit**. Please note that you can only modify the default values.

- Remove an existing custom field.

1 Select the custom field you want to remove from the list.
2 Click on **Delete**.

4. Select **OK** or **Apply** to save the changes.

IMPORTANT If you delete a custom field, all contents of it in all projects are permanently removed from InLoox PM.

NOTE Each custom field is shown in its respective project next to a box that allows you to enter a custom value.

Customize the InLoox PM language files

InLoox PM uses so-called resource files for all texts and messages that are displayed. These are located in the program folder on the InLoox PM client. If you want to adapt the displayed texts and messages to the requirements of your company you have to modify them in the resource files. You can find them in the program folder on the InLoox PM client.

IMPORTANT

- Changing the files can cause problems with the program, especially if data are deleted.
- When you re-install InLoox PM, the client setup will overwrite any changes you have made to the language files.

List of the language files (delivery staus)

File name	Contents
InLoox.xml	English, German, Spanish, Italian, French, Russian.

Please follow these steps to customize the InLoox PM resource files:

1. Close Outlook on the client concerned.
2. Open the relevant language file with the **InLoox PM Resource Editor**. This tool can be found in the Download area of the InLoox PM website.
3. Make the required changes to the file and save it.
4. Test the changes on the InLoox PM user interface.
5. Distribute the file among other InLoox PM clients as required.

Generate and edit groups

In the InLoox PM Options, you can define groups that are available in every InLoox PM projects on the project pages Work Packages, Planning, Time Tracking, Budgets and Budget Overview. The groups help you to structure the data in a more meaningful way and allow an ongoing automatic comparison between work packages, time tracking entries, planning elements and budget positions. They can also also carry a currency code.

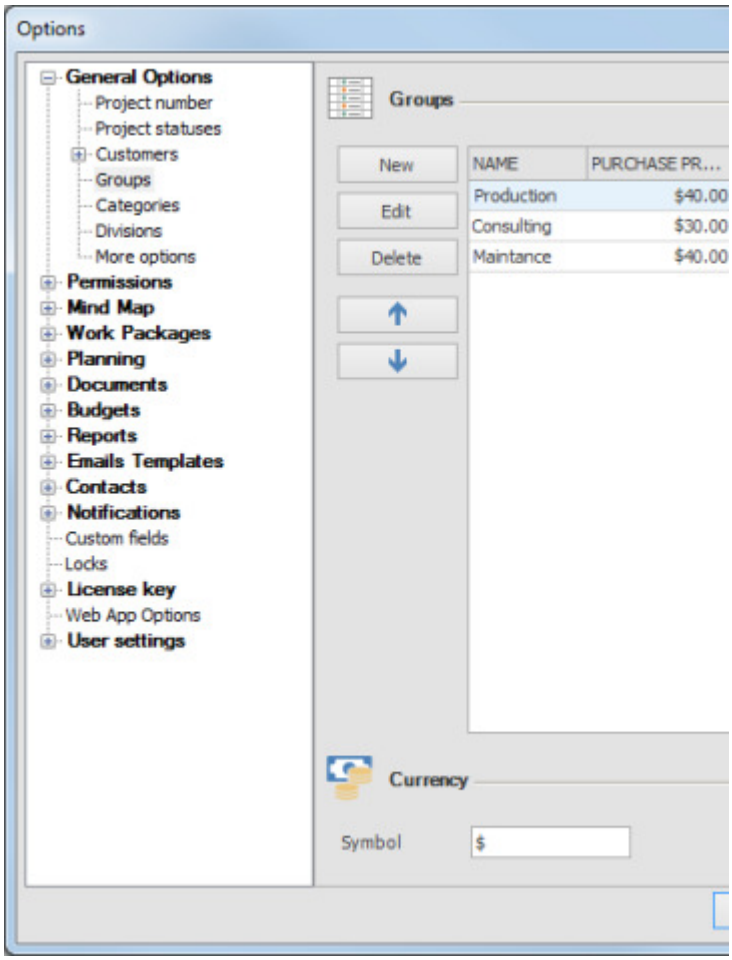
IMPORTANT Please note the possible effects when changing settings. These are described in this chapter.

NOTE In this program section, you are also able to define purchase and selling prices. These are used on the Budget page, for example to prepare time tracking entries recorded on the Time Tracking page for billing.

To manage groups, do the following:

1. Open the InLoox PM Options.

2. Under General options click Groups. On the right side you will see the Groups area.



3. Do one of the following:

   - Create a new group by clicking **New**.

     - In the **New Group** dialog box, in the **Name** field type a group name.
     - In the **Purchase price** and **Disposition price** fields, enter the prices you want.
     - Click **OK**.

   - The existing groups are displayed in the **Groups** list according to the order in which they appear in the InLoox PM projects. Double-click the entry that you want to change or click **Edit**.

   - Select a group you want to remove from the list and click **Delete**.

   - You can change the groups order by clicking **Up** and **Down**. The selected group will be moved one position upwards or downwards.

- In the **Currency** area, in the **Symbol** field, type a currency symbol, which is supposed to be used for amounts of money system-wide, e.g. €, $ or CHF.
- In the **Digits** field, type the number of digits (fractional digits) that is supposed to be used system-wide.

  TIP Use the filter feature to quickly reach the needed data from each column. For more information, see Search and filter in a project.

4. Click **OK** or **Apply** to save the changes.

WARNING **Effects** of changing or deleting groups:

- **Adding** and **renaming** groups has no effect on existing projects.
- When group prices are changed, the old amounts remain initially unchanged in all projects.
  The amounts are updated when the relevant planning element, time tracking entry or budget position is **next edited**.
- The **deletion** of groups has a **permanent** effect, namely that
  - the group and associated amounts are no longer displayed in the budget overview.
  - to all planning elements, time tracking entries and budget positions using the deleted groups must be assigned a new group **when next edited**.

Effects of changing the currency symbol

- The currency is not automatically redenominated. If, for example, **€** is replaced by **$**, InLoox PM does not recalculate the amounts, but simply changes the currency symbol as if the rate of exchange were 1:1.

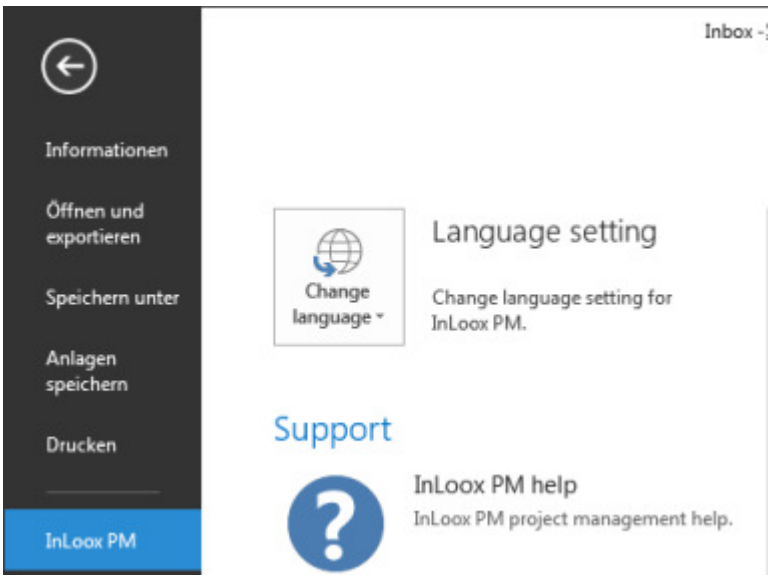
Open the InLoox PM options

In the InLoox PM options, you can make changes to the basic parameters and you can set up permissions in InLoox PM.

The administrator opens the **InLoox PM Options** as follows:

1. Click the **File** tab.

2. Click **InLoox PM Options** in the navigation pane.



TIP Users require administrator permissions to change global settings. For more information, see Set up permissions. User settings can be changed by any user.

Open the InLoox PM options in Outlook 2007

In the InLoox PM options you can make changes to the basic parameters and you can set up permissions in InLoox PM.

The administrator opens the **InLoox PM Options** as follows:

1. Click Tools in the InLoox PM Toolbar.
2. Click Options in the drop-down list.

TIP Users require administrator permissions to change global settings. For more information see Set up permissions. User settings can be changed by any user.

Work offline with InLoox PM

With **InLoox PM Workgroup Server** and **Enterprise Server**, users work directly on a database server. You can, however, configure individual workstations to use InLoox PM when it is disconnected from the network. When reconnecting with the company network, an automatic synchronization is carried out.

IMPORTANT Not all database systems support offline availability or replication. InLoox PM offers the data structures that are needed for synchronization and replication, but uses the synchronization features of the database system. In certain circumstances, you might need to change the database system or the related software to take advantage of offline availability. Check the documentation of your database system regarding offline availability and replication.

TIP You find step-by-step guides about InLoox PM configuration for offline availability in the Support section of the InLoox website.

In case of problems, please contact our installation support. For the contact information see Request support for the InLoox PM installation.

Install InLoox PM

Topics

Install InLoox PM

Request support for the InLoox PM installation

Copy database file for InLoox PM 8 Personal Plus

Install InLoox PM

IMPORTANT Please note that Outlook must already be installed and fully operational before you can install InLoox PM. The installation usually takes no longer than five minutes per client. The server installation (only required for **InLoox PM Workgroup Server** and **Enterprise Server**) can be performed directly from the client.

In the Whitepapers of the InLoox PM Website, you find step-by-step guides for the InLoox PM installation:

- for InLoox PM Personal
- for InLoox PM Workgroup Server
- for InLoox PM Enterprise Server.

The Download section also contains an **MSI package** for the deployment via software distribution to multiple clients.

TIP In our Support center you will find assistance in solving installation problems. In case of problems, you can also contact our installation support. For more information, please see Request support for the InLoox PM installation.

Request support for the InLoox PM installation

Outlook is a complex software product. Difficulties in connection with the installation of InLoox PM are not common but are too complex and too new to have been described in the Help file. Please note that we can unfortunately only deal with problems arising from the installation of InLoox PM and not with general Outlook problems.

Please follow the link to find all of our contact details.

Copy database file for InLoox PM 8 Personal Plus

The InLoox PM 8 Personal Plus edition allows you to install InLoox on two different devices. In order for you to access your project data from a second device, you need to copy the database files first.

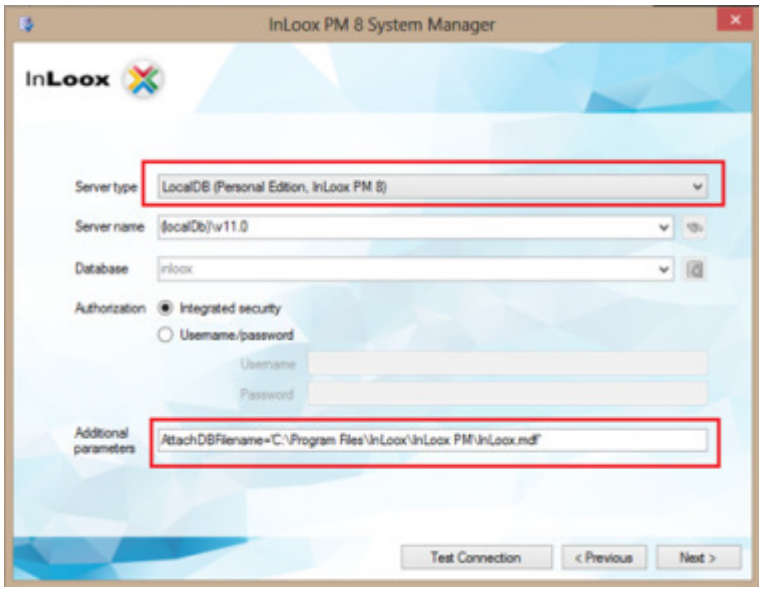
Please follow the instructions below:

1. Open the InLoox PM installation directory on the source device. The default directory is:
2. C:\Programs\InLoox\InLoox PM
3. Copy the files **inloox.mdf** and **inloox_log.ldf**.
4. Paste the files to the InLoox PM installation directory on the target device.
5. The database is now ready to be used on both devices.

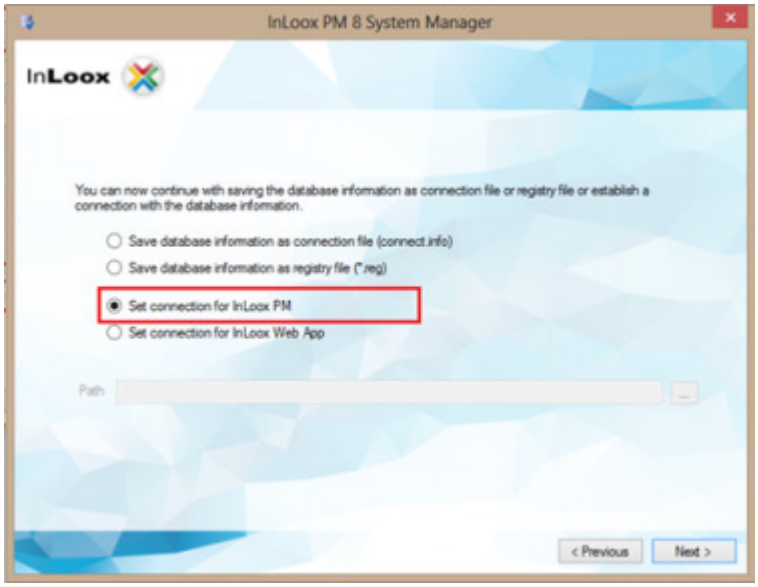
If you prefer to save the database files to a different directory (a local directory), please follow the instructions below:

1. Copy the files **inloox.mdf** and **inloox_log.ldf**, and paste them to the directory you like.

2. Run the InLoox System Manager. You can find the required file here: http://cdn.inloox.com/content/download/20639/232074/file/InLooxSystemManager_20140428.zip
3. Select the following **Server type: LocalDB (Personal Edition, InLoox PM 8)**.
4. Replace the default path in **Additional parameters** with the directory of your choice.



5. Click on **Test Connection** to test the database file path.
6. If the test is successful, click on **Next** to continue.
7. Select **Set connection for InLoox PM**.


InLoox PM 8 System Manager
InLoox
You can now continue with saving the database information as connection file or registry file or establish a connection with the database information.
Save database information as connection file (connect.info)
Save database information as registry file (*.reg)
Set connection for InLoox PM
Set connection for InLoox Web App
Path
< Previous
Next >

8. Click on **Next**

The connection has been successfully changed and InLoox PM is now ready to be used on both devices.

Security and privacy

Topics

Set up permissions

List of permissions

Create an InLoox PM account

Log on as InLoox PM user

Select a suitable system for data storage

Back up project data

Lock a project / Clean up project locks

Set up permissions

In InLoox PM, you can configure finely structured and freely definable permissions. So, you can clearly define responsibilities and make sure that only authorized users gain access to sensitive data.

You can set permissions in InLoox PM Workgroup and Enterprise Server in the InLoox PM options.

NOTE InLoox PM is delivered without permissions being set. So, every user can see and change all permissions. This might be a security risk.

Article content

Overview of role and account-based security architecture

Set user-based permissions

Set role-based permissions

Overview of role and account-based security architecture

In InLoox PM, you can select role-based and user-based permissions.

Role permissions are defined according to the function carried out by each person involved in the project, be it as project manager, team member, customer, partner or any other activity. InLoox PM then assigns the correct permission to each person assuming a given role.

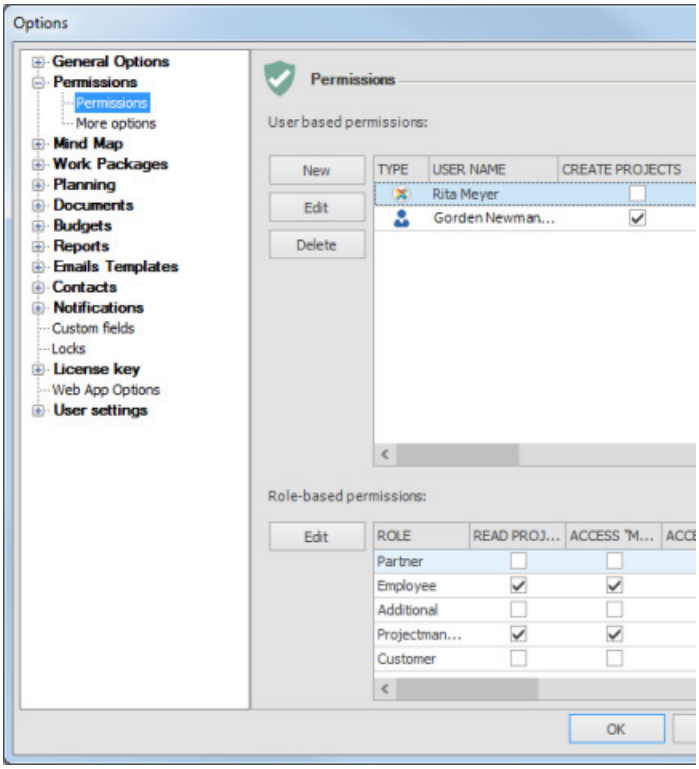
IMPORTANT User account oriented permissions apply to all projects. This allows, for example, company management to look at all current and concluded projects, whereas practical responsibility remains in the hands of the project manager and team.

User account oriented permissions require a Windows Server with Active Directory or InLoox PM contacts. Role permissions additionally require Exchange Server.

To open the permissions please follow these steps:

1. Open the dialog box InLoox PM Options.

   TIP For more information on how to open the InLoox PM options, please see Open the InLoox PM options.
2. Under Permissions, click Permissions. On the right side, you see the **Permissions** section.



Permission Mode	Remarks
User-based permissions	Permissions based on Windows and InLoox user accounts. Active directory accounts (in domain mode) and local Windows and InLoox user accounts (in workgroup mode) are supported. Apply across all projects and on the entire database. NOTE InLoox PM does not support Windows groups at this time.
Role-based permissions	Users acquire permissions by assuming a role in a project. Project members are all persons who are listed in the project on the Management page as "In Charge". Possible roles: Project manager, Team member, Customer, Partner, Other. Microsoft Exchange Server or InLoox contacts are required. NOTE Persons are identified by their Windows or InLoox Security Identifier, or SID, and the Windows X400 address, or Exchange address. Persons with the same X400 address have the same role-based permissions in InLoox PM. If this is not what you want, please deactivate the role-based permissions entirely by removing all permissions for all roles.
Examples	InLoox PM combines role-based and user-based permissions. The permission records of both modes are added. The example below illustrates a common configuration: The role "team" may "read projects " and "read budgets". All other roles are ignored for the sake of clarity. The user account "Gordon Newman" is authorized to "edit projects " and "edit budgets". TIP For more information about permissions, see List of permissions. "Gordon Newman" is part of the "team" in the project "Product Development" There are three other projects in which "Gordon Newman" is not involved and therefore does not have the role "team" Consequently, these permissions apply to Gordon Newman:

Permission Mode	Remarks
	He may read and edit the project "Product Development". He may also read and edit budgets in this project. Gordon Newman has these permissions in all projects in which he is in the team role. "Gordon Newman" cannot see any projects in which he is not a team member. He does not have the permission to "read projects", which is a prerequisite for all other permissions. Thus, Gordon Newman has no permissions for any other projects. The following permissions apply to all other team members involved in the project "Product Development": They may read the project "Product Development" and read, but not edit budgets. They do not have the permission record of the account "Gordon Newman". Persons who are team members in other projects than "Product Development" can see, in contrast to Gordon Newman, a number of projects, but may not edit any of them. InLoox PM permissions are very flexible and allow a wide variety of scenarios to be covered without high administration effort. If you have questions on the assignment of permissions, we will be pleased to help. TIP Our contact information can be found under Contact on the InLoox web site.

Set user-based permissions

Set user-based permissions:

- Set permissions for a user In the User-based permissions section, click New.

    1. In the Permissions dialog box, click the **Arrow** to select the user.
    2. Choose from the drop-down list between Active Directory user, Exchange user or InLoox PM user.

        - Active Directory user

            - In the **Select User** dialog box, click **Object Types**.

                NOTE You can also use this button to open the **Select User** dialog box.

- In the **From this Location** box, click **Locations** and select **Entire Network**. Click **OK**.
- Type the required user name into the **Enter the object name to select** field.
- Click **Check name**. A user name that has been recognized by Windows is shown underlined.
- Click **Advanced...**, if you need to search for a user name.
- Click **OK**.

- Exchange user

  In the **Select Contact** dialog box, select an address book and then the respective name from the list. Click **OK**.

- **InLoox PM user**

  In the **Select Contact** dialog box, select an InLoox PM address book and then the respective name from the list. Click **OK**.

  TIP For more information on how to create an InLoox PM account, see Create an InLoox PM account.

1. Select the permissions for the respective user from the **Permissions** list.
   TIP For more information about permissions, see List of permissions.
2. Click **OK**.

- **Edit user permissions** Choose one user from the list and click **Edit**. Click **OK** after you have made all changes you want.
- **Remove user permissions** Choose one user from the list and click **Delete**.

Set role-based permissions

Please follow these steps to set role-based permissions:

NOTE Role-based permissions are only active if there is at least one user-based administrator permission.

1. In the **Options** dialog box, in the **Role-based permissions** section, click **Edit** to change the selected role-based permission.
2. Select the permissions for the role from the **Permissions** list.
3. Click **OK**.

List of permissions

The following permissions apply to **InLoox PM Workgroup Server** and **Enterprise Server**. Permissions for the actions listed can be assigned to users or roles.

Description	Permission	Restriction or Prerequisite
Create projects	User has the right to create new projects.	Only available with user-based permissions
Create project request	With this permission the user can add a new project request for the release, in case he does not have project permissions.	Prerequisite: no project permissions
Release project request	Right to release the created project requests.	Prerequisite: project permissions
Read projects	Project visible in the InLoox PM project list. Project can be opened. Project can be exported if the right to use existing reports is granted.	None
Access list	Right to read the list of a project.	Prerequisite: Read projects
Access mind maps	Right to read all mind maps of a project.	Prerequisite: Read projects
Access work packages	Right to read all work packages in the project	Prerequisite: Read projects

Description	Permission	Restriction or Prerequisite
Access planning	Right to read all planning elements of a project.	Prerequisite: Read projects
Access time tracking	Right to read all time tracking entries of a project	Prerequisite: Read projects
Access own time tracking entries	Right to read all own time tracking entries of a project.	Prerequisite: Read projects
Access documents	Right to open and read all documents of a project.	Prerequisite: Read projects
Access budgets	Right to read all budgets, budget positions and the budget overview of a project.	Prerequisite: Read projects
Edit projects	Project can be changed. This right is a prerequisite for all actions which allow users or roles to modify data.	Prerequisite: Read projects
Edit management	Right to change the project master data on the Management page.	Prerequisite: Edit projects
Edit project contacts	Project contacts can be added, changed or deleted. It allows the user to control the roles of persons in a project.	Prerequisites: Edit projects Edit Management
Add project notes	Allows you to create and change project comments on the Management page.	Prerequisites:

Description	Permission	Restriction or Prerequisite
		Edit projects Edit Management
Delete own project notes	Allows you to remove your own project comments on the Management page, but not to remove other users' project comments.	Prerequisites: Edit projects Edit Management
Lock projects	Project can be locked for other users. Users without the respective permission may not edit locked projects and cannot remove the lock.	Prerequisites: Edit projects Edit Management
Edit list	Right to modify the entries in the list of one project.	Prerequisite: Read projects
Edit mind maps	Allows adding, changing and deletion of all mind maps of a project.	Prerequisite: Edit projects
Edit work packages	This permission allows you to add, modify and remvoe work packages.	Prerequisite: Edit projects
Edit planning	Allows adding, changing and deletion of all planning elements of a project.	Prerequisite: Edit projects
Edit time tracking	Allows adding, changing and deletion of *all* time tracking entries of a project.	Prerequisite: Edit projects
Edit own time tracking entries	Allows adding, changing and deletion of *own* time tracking entries of a project.	Prerequisite: Edit projects

Description	Permission	Restriction or Prerequisite
Edit time tracking without time limit	Allows adding, changing and deletion of past time tracking entries of a project.	Prerequisite: Edit projects
Edit documents	Allows adding, changing and deletion of all documents in the document list of a project.	Prerequisite: Edit projects
Edit budgets	Allows adding, changing and deletion of all budgets and budget assets of a project.	Prerequisite: Edit projects
Delete projects	Delete a project.	None
Create address books	User has the right to create new address book.	None
Read address books	Access all address books.	None
Edit address books	Allows modifying address books.	Prerequisite: Read address books
Read own address books	Access own address books	Prerequisite: Create adderss books
Edit own address books	Right to change own address books	Prerequisites: Create address books Read own address books
Delete own address books	Allows to remove own address books and other users' address books.	Prerequisites:

Description	Permission	Restriction or Prerequisite
		Create address books Read own address books
Use existing reports	All reports can be used. The InLoox PM report generator filters the data for which the user does not have permission out of the report (e.g. if no right to read budgets has been granted, no budget data will be included in the exported reports.)	None
Create and edit report templates	Allows the creation, changing and deletion of report templates.	Only available for user-based permissions
Administrator	Controls access to master data maintenance and administrator functions. These include the following menu commands in the InLoox PM Ribbon (in Outlook 2007 InLoox PM Toolbar) and Options: Edit planning templates Right to rename and delete InLoox PM planning templates. Edit budget assets Right to create, change and delete InLoox PM budget assets. Edit budget state Right to create, change and delete InLoox PM budget states. Edit notifications Right to change Notification templates. Edit categories Right to create, change and delete InLoox PM categories. Edit custom fields Right to create, change and delete custom fields.	Only available for user-based permissions

Description	Permission	Restriction or Prerequisite
	Remove project locks Right to remove data record locks. Recycle projects Right to restore or permanently remove deleted projects. Licenses Right to add and delete InLoox PM license keys. Options Right to change the InLoox PM options. Incorporates the right to change permissions.	

Create an InLoox PM account

To logon to the InLoox PM project management platform you can use Windows or InLoox PM Authentication. With an InLoox PM Authentication, external team members, project partners or stakeholder without their own Windows user account in the corporate network are able to log into InLoox PM directly with user name and password.

IMPORTANT Only users with administrative permissions can create an InLoox PM account.

Article content

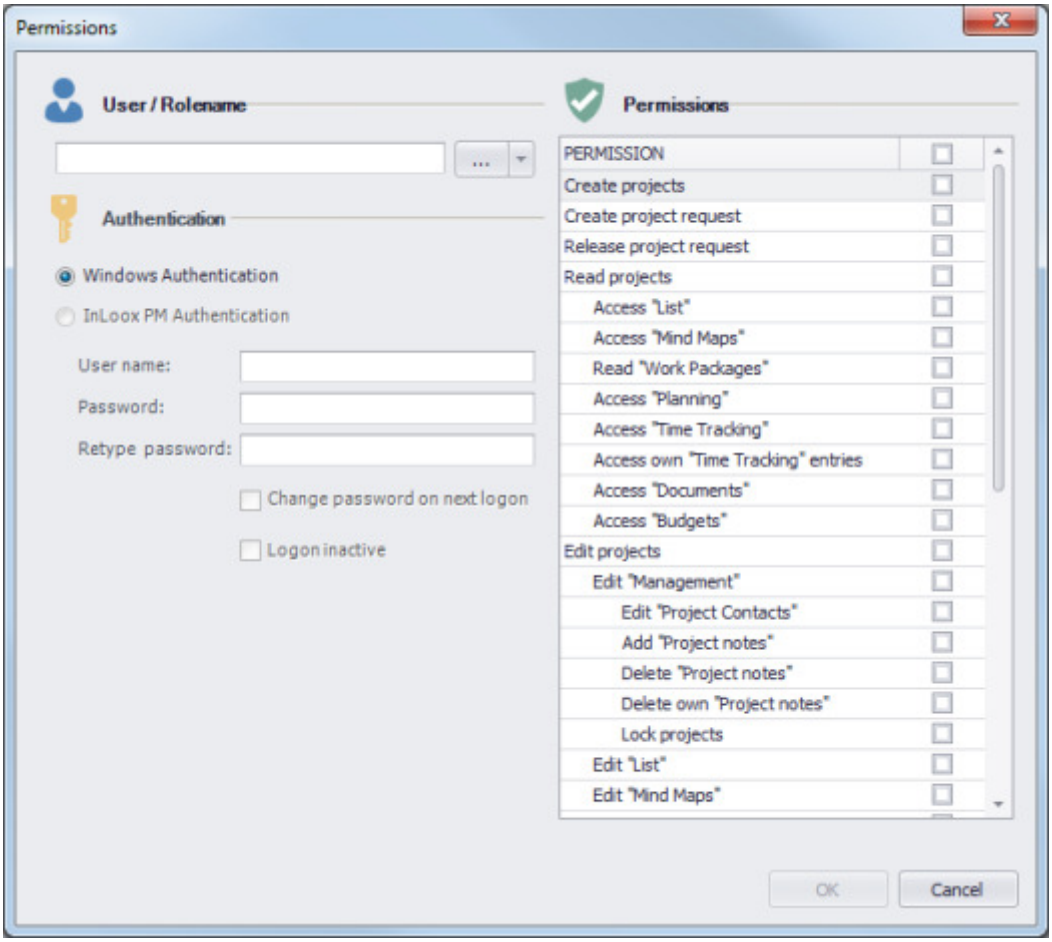
InLoox PM authentication

Change the InLoox PM password

InLoox PM authentication

Please follow these steps to create an InLoox PM account:

1. Activate first the **InLoox PM contact management**.
2. Create a new contact in the **InLoox PM Contacts**.
3. Open the **InLoox PM Options** dialog box.
4. Under **Permissions** click **Permissions**.
5. In the **User-based permissions** section, click **New**.



6. In the **Permissions** dialog box, please follow these steps:

    1. Click the **Arrow** and choose from the drop-down list **InLoox PM user**.
    2. In the **Select Contact** dialog box, select **InLoox PM address book** from the drop-down list **Address book**. Choose a name from the list and click **OK**.
       The contact name is now displayed in the **User name box**, in the **Authentication** section, under **InLoox PM Authentication**.
    3. You can change the name in the **User name** field.
    4. In the **Password** field, type a new password for the InLoox PM authentication.
    5. Enter this password again in the **Retype password** box to confirm it.
    6. Activate one of the following check boxes:

        - Activate the **Change the password on the next logon** check box to allow the InLoox PM user to change his or her password. See Change InLoox PM password below.
        - Activate the **Logon inactive** check box to deactivate the authentication.

    7. Select the permissions from the **Permissions** list for the InLoox PM user.

8. Click **OK**.

7. Click **OK** or **Apply** to save the changes.

Change the InLoox PM password

Please follow these steps to change the InLoox PM password

1. Open the **InLoox PM Options**.
2. Under **User settings** click **User Login**.
3. In the **User Login** section, choose **InLoox PM Authentication** and click the **Change Password** button.
   You can also change your user name in the **User name** field.
4. In the **InLoox PM Authentication** dialog box, type your current password in the **Current password** field.
5. Type the new password in the **Password** field.
6. Type the new password again in the **Retype new password** field.
7. Click **OK**.
   Now, you can use your new password for the InLoox PM Authentication.

Log on as InLoox PM user

Choose between Windows Authentication and InLoox PM Authentication to logon to InLoox PM.

TIP Create an InLoox PM account to be able to logon as InLoox PM user. For more information see Create an InLoox PM account.

1. On the **InLoox PM** tab, in the **Extras** group, click **Log on as**.

   NOTE In Outlook 2007, click **InLoox PM Folder** in the **InLoox PM Toolbar** and then **Log on as**.

2. On the **InLoox PM Authentication** dialog box choose **InLoox PM Authentication**.

3. Type your user name for the InLoox PM authentication in the **User name** field.
4. Type your password in the **Password** field.
5. Activate the **Always use this credentials** check box, if you want to save your authentication data in the system.
6. Click **OK**.

TIP As an InLoox PM User, you can change your password anytime. See Create an InLoox PM account in the Change the InLoox PM password section.

Select a suitable system for data storage

As of version InLoox 6, the InLoox PM data storage has been redesigned to support data storage in SQL databases (SQL = "Standard Query Language") to provide an effective permission system and to improve response times.

The following systems are used by the different InLoox PM editions:

InLoox PM edition	Data storage
Personal	Via Microsoft SQL Server Compact Edition. Data is stored in a file which normally carries the extension .MDF (SQL Server Database File). Filename is InLoox.mdf. The file is located in the InLoox PM installation folder.

InLoox PM edition	Data storage
Workgroup Server and Enterprise Server	Database management systems supported for networked operation are: Microsoft SQL Server (all versions and editions of SQL Server 2005, 2008, 2012 and 2014) Oracle (versions 11g, 10g, 9i, 8i, 8.0, including "Personal", "Express" and "x64" editions) MySQL (version 5.0)

Back up project data

To back up all of your InLoox PM data you can use the correspondent tool producer.

A regular data accortding to the InLoox PM editions backup is carried out as follows

InLoox PM edition	Procedure
Personal	It is sufficient to make regular copies of the InLoox PM files on CD-ROM or tape. The data file, which normally has the extension .SDF (SQL Server Database File), must not be opened in any program. The standard name of the file is InLoox.mdf. The file is stored in the InLoox PM installation folder.
Workgroup Server and Enterprise Server	Save the entire InLoox PM database on the server where it is published. You can use any software which supports the backup of databases during operation (scheme and data) and which is suitable for your database system. Unfortunately, it is quite difficult to backup offline copies (database replications) located on the users' computers. We recommend to synchronize workstations with the database server at frequent intervals; this strategy reduces the risk of losing changes which were made offline.

IMPORTANT Documents stored in InLoox PM must be backed up separately. InLoox PM only saves links to these objects, a backup of the InLoox PM database is not sufficient to back up the documents as well. The backup strategy and software depend on the storage location of the documents (files on the local computer, the server or the SharePoint document library), the number of users and the data volumes.

Lock a project / Clean up project locks

InLoox enables you to lock a project if you want to avoid further changes to a project. You can delete a project lock anytime. To be able to lock a project or to delete a project lock you have to have the permission to **Lock projects**.

Article content

Lock a project

Clean up project locks

Lock a project

Please follow these steps to lock a project:

1. Open an existing project or create a new one.
2. On the **Management** page, on the **Edit** tab, in the **Status** group, click **Lock project**.
3. On the **Start** tab in the **Actions** group click **Save and close**.

Clean up project locks

InLoox PM applies to projects in process a so-called record lock feature. Under certain circumstances, this lock can remain in place, for example when a VPN user unexpectedly got disconnected from the network. To clean up all record locks in InLoox PM, proceed as follows:

IMPORTANT Please make sure that all users have saved and closed all of their InLoox PM projects before you start to clean up project locks.

1. Open the InLoox PM options.
2. Click Locks.
3. In the Delete locks section, click Unlock projects.
4. Confirm the safety query with Yes.

5. Click OK or Apply to save the changes.

Legal notices and agreements

Topics

Copyright

License Terms of InLoox GmbH / End-User License Agreement (EULA)

InLoox PM license terms

Copyright

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(3) A user manual and any other documents possibly provided by InLoox may only be copied for the company’s internal purposes.

(4) The Customer shall not be entitled to transfer the Software without the written consent of InLoox; this applies in particular in the event of sale. InLoox shall agree to the passing-on of the Software (in whole or in part) to a third party under the following conditions:

– The Customer hands over the original data storage media (if there is one), this EULA and the General Terms of Business of InLoox to the third party, deletes all other copies in particular on data storage media, in read-only memories or main memories, he definitely stops using the Software and submits a written confirmation of the fulfilment of his duties to InLoox.

– The third party declares to InLoox in writing that it has received the aforementioned components and acknowledges them as binding in the legal relationship with InLoox, noting the General Terms of Business and this EULA.

– There are no important opposing reasons.

(5) All other acts of utilisation, in particular leasing, industrial sale (unless explicitly stated otherwise by written reseller agreement/authorised dealer agreement), lease and distribution of any tangible or intangible property are prohibited without the prior written consent of InLoox. InLoox notes, that customers who violate copyright laws, are liable for all damages that occur as a result of these copyright law violations.

(6) Any subject matter of the Agreement, documents, proposals, test programs, etc. of InLoox to which the Customer gains access after conclusion of the Agreement shall be considered intellectual property and must be treated confidentially as a business and company secret of InLoox in accordance with § 9.

§ 4 Contractual Obligation and Termination of the Agreement

In the event of termination due to infringement of this EULA you are obliged to return or destroy all original versions and copies of the Software and all other components and to notify InLoox of the destruction in writing.

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(1) In the event that you are a business owner you undertake to inspect all delivery items of InLoox immediately upon receipt of the goods in accordance with the regulations of commercial law (§ 377 of the German Commercial Code) and to make complaints in respect of defects with an exact description of the defect, submitted in writing. Each Customer is obliged to test all modules with regard to usability in the concrete situation before starting any operative use. This also applies to programs the Customer receives in the context of supplementary performance or a possible maintenance agreement.

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protection mechanisms in his network as well as his server. InLoox shall not bear the risk of incompatibility of the Software with the software or hardware used by the Customer.

(3) You shall not be entitled to use or modify the logo and/or trademarks of InLoox unless the company management of InLoox has given its prior agreement to the use or modification of the logo in writing.

(4) Subject to the provisions of § 69 e German Copyright Act (UrhG) you may not reverse engineer, decompile or disassemble the Software.

(5) You undertake to indemnify and defend InLoox from all claims of third parties, including reasonable lawyers' fees arising or resulting from any use of this Software against the agreement.

§ 6 Warranty

(1) Delivered Software possesses the agreed-upon characteristics, is suitable for the applications assumed by the contract and which are otherwise standard, and has usual quality of software of this type. Not every flaw which is connected with the Software is a defect which implies warranty rights. An impairment in the Software's functioning which results from hardware defects, environmental conditions, improper operation and the like, is not a defect. An insignificant deterioration in quality will not be taken into account. InLoox guarantees that no rights of third parties are violated through the use of the Software by the Customer in accordance with the provisions of the contract.

(2) Customers who are consumers within the meaning of § 13 German Civil Code (BGB) have in respect to defects of the purchased good the rights set out in the German Civil Code (BGB). In case that a consumer is entitled to claim damages hereafter, § 7 applies accordingly.

(3) In all other cases of liability for defects the following terms apply:

(a) InLoox may first attempt to remedy any material defects. InLoox may choose to remedy the defect by eliminating it, i.e. also by demonstrating possibilities by means of which the effects of the defect can be avoided, or through delivery of a program which does not contain the defect. An equivalent new program version or the equivalent previous program version which had not contained the faults is to be accepted by the Customer, when this is reasonable. In the case of defects in title, InLoox shall give the assurance that it will provide the Customer with legally unchallengeable option to use either the Software or equivalent software, at its option.

(b) The Customer shall support InLoox in the analysis of faults and removal of defects by specifically describing problems which occur, providing InLoox with complete information and granting it the necessary time and opportunities to remove the defect. InLoox may also remove the defect on-site or at its place of business, at its discretion. The performance of InLoox may also take the form of remote maintenance. The Customer must ensure the necessary technical prerequisites at his own expense and, after due prior notification, provide InLoox with access to his computer equipment.

(c) InLoox may levy additional charges, when the Software is modified, employed outside the environment provided for or incorrectly operated. It may demand compensation if no defect is found or if it is incorrectly/insufficiently informed of a fault. The burden of proof lies with the Customer in accordance with § 254 German Civil Code (BGB).

(d) If InLoox ultimately refuses to remedy the defect, if it ultimately is unsuccessful or if this is unreasonable for the Customer, he may withdraw in writing from the contract or correspondingly curtail the payment and in accordance with § 7 demand damages or reimbursement of expenses.

(e) Insofar as the above has not been otherwise agreed, further liability on the part of InLoox within the meaning of liability for defects is excluded. In particular, liability for defects does not apply if and to the extent that the Software is improperly used by the Customer or used in a defective or incompatible hardware or software environment. The same applies in the event that the Customer undertakes unauthorised modifications of the Software.

(g) The statute of limitation for claims for defects is one year as of the statutory commencement of the limitation period.

§ 7 Liability

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(2) Moreover, InLoox is only liable for culpably infringing contractual obligations the fulfilment of which renders a correct execution of the contract possible, and the Customer can always trust on said material obligations being observed (cardinal obligation). This includes, in particular, the obligation to fulfil a performance free from defects. In this case InLoox's liability is limited to the loss or damage foreseeable upon conclusion of the contract.

(3) A further liability of InLoox is excluded.

(4) Should the liability for damages on the part of InLoox be excluded or reduced, this shall also apply with regard to personal liability for compensation for damages on the part of its employees, representatives and persons employed in auxiliary tasks.

(5) The right to contest the charge of contributory negligence remains open to InLoox. It is pointed out to the Customer that, within the framework of his obligation to exercise diligence, before using the Software for the first time, he must test whether the installation of the Software might lead to particular interference with pre-installed software, and that he must further ensure back-up of his data before the

first installation as well as during the course of operations and, in the case of a suspected fault in the Software, that he implements all additional reasonable measures required for security.

(6) The statute of limitation for claims of the client who is not a consumer is one year as of the statutory commencement of the limitation period.

(7) The conditions of this paragraph apply mutatis mutandis to component manufacturers of the Software.

§ 8 Software Updates and Upgrades

At the sole discretion of InLoox, users may be provided with updates and upgrades to the Software. InLoox retains the right to provide upgrades for a fee. Upon installation of an upgrade, users shall not use, separate or transfer the previous version to a third party separately. Unless InLoox provides other terms and conditions with an update or upgrade, the terms and conditions of this EULA shall continue to apply. Users may refuse to accept an update or upgrade. However, upon release of an update or upgrade, InLoox may have no further obligation to support the previous version.

§ 9 Start and End of the Customer's Rights

(1) The ownership of the supplied items and the rights in accordance with § 2 and § 3 shall not be transferred to the Customer until complete payment of the purchase price. Before that, he only has a preliminary right of use in accordance with the law of obligations, revocable in accordance with § 9 (2).

(2) InLoox shall be entitled to revoke the rights in accordance with § 2 and § 3 for important reasons, in particular for the reasons specified in § 3 of the General Terms of Business of InLoox or to terminate the Agreement respectively. An important reason particularly exists if the Customer does not effect the due payment, if he continues to infringe the obligations under § 2 and § 3 of this Agreement in a substantial way, despite written reminders, or in the event that a petition of bankruptcy has been filed in respect of the Customer's assets.

(3) If the right of use in accordance with § 3 in conjunction with § 2 does not occur or if it should end, InLoox shall be entitled to demand from the Customer the return of the provided goods or demand a written assurance that they have been destroyed and that all copies have been destroyed, along with the written assurance that this has been effected.

§ 10 Secrecy

(1) The Contracting Parties undertake to treat all objects they receive from the other Contracting Party or objects they gain knowledge of (e.g. software, documents, information) which are legally protected, contain business or company secrets or are designated as confidential, confidentially - even beyond the expiration of the Agreement, unless these objects are publicly known without any infringement of the obligation of secrecy. The Contracting Parties shall store and save these objects in such a way that any unauthorised access by third parties is excluded.

(2) The Customer permits access to the subjects of the Agreement only by his personnel or third parties requiring access in order to perform their assigned tasks. He shall inform these persons about the need for these objects to be kept confidential.

§ 11 Applicable law, legal venue

The law of the Federal Republic of Germany shall be applicable, excluding the United Nations Convention on Contracts for the International Sale of Goods. The place of performance and legal venue for all disputes arising from and in connection with this Agreement shall be the registered office of InLoox GmbH (Munich, Bavaria) for agreements with business owners (traders). This also applies if the Customer does not have a general place of jurisdiction in Germany or if his place of residence or usual abode is unknown at the time the proceedings are brought forth.

§ 12 Safeguarding Clause

If any provision of this Agreement should be or become invalid, such invalidity shall not affect the validity of the other provisions of this Agreement even if essential provisions are concerned. The Parties agree to replace the invalid provision by a legally effective regulation which comes as closest to the contractually stipulated legal and economic intent of the invalid provision and ensures the operability of the Agreement in the sense of what both Parties had intended. The same shall apply in the event that the Parties have not discovered a gap in the provisions at the time the Agreement was concluded or if such a gap becomes known or occurs later. In that case, the Parties shall be obliged to generate a written supplement to the Agreement in the sense of the aforementioned.

Date: 2013-05-24

InLoox PM license terms

At the time of the installation you have entered a valid license key.

TIP For more information about the installation, see Install InLoox PM.

The license key consists of five groups of six alphanumeric characters, each in the following format: 111111-222222-333333-444444-555555.

Your license key is valid as follows:

- for one version of InLoox PM (Personal 8.x/Workgroup 8.x/Enterprise 8.x)
- for a specific number of users and servers
- for an unlimited time

WARNING Apply the following restrictions:

- InLoox PM Personal **must not** be used **as a server**.
- When the **maximum number** of named users has been reached, InLoox PM will no longer function on any user on which it was last installed or started.
- The license manager on the terminal server counts the number of **active users** for whom InLoox PM has been licensed.

InLoox PM monitors the permissible number of users. The following message is displayed to indicate that there are too few licenses:

"The maximum number of users has been reached. It is not possible to use InLoox PM.
Please check the license key or ask your system administrator."

The following procedure makes initially sure that only those active users on which InLoox PM is currently installed are counted:

1. On the **Outlook Ribbon**, click the **File** tab.
2. Click **InLoox PM Options** in the navigation pane.

   NOTE In Outlook 2007click **Extras** in the **InLoox PM Toolbar**, then click **Options**.
3. Under **License key**, click **License key**.

   IMPORTANT The **License key** in the options will only be displayed if you have administrator permissions.
4. On the **InLoox PM master licenses** area, choose a license key from the list and click **Delete**.
5. Click **OK** or **Apply**.

If the error message persists, InLoox PM must be removed from the excess clients or additional licenses have to be acquired. Please refer to your reseller or the producer for this. You will receive immediately a license key to license the required number of users for InLoox PM.

TIP For more information on how to contact the producer, please see Contact the InLoox PM support.